HOUSING VISION

Strategic Housing Market Assessment: West Somerset Update

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Strategic Housing Market Assessment: West Somerset Update

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Contents

Acronyms & Abbreviations

APS	Annual Population Survey
ASHE	Annual Survey of Hours and Earnings
BIS	Business Information & Skills
BRMA	Broad Rental Market Area
CLG	Communities and Local Government
CORE	COntinuous REcording of lettings and sales of social housing
CPI	Consumer Price Index
CT	Council Tax
DRA	Dispersed Rural Area
DRAND	Dispersed Rural Area West Somerset
DWP	Department for Work and Pensions
ESA	Employment and Support Allowance
EU	European Union
EXDF	Exmoor and Downland Fringe and Exmoor National Park
GIS	Geographical Information System
GP	General Practitioner
HB	Housing Benefit
HESA	Higher Education Statistics Agency
HMO	House in Multiple Occupation
HSSA	Housing Strategy Statistical Appendix
IMD	Index of Multiple Deprivation
JSA	Job Seekers Allowance
LFS	Labour Force Survey
LHA	Local Housing Allowance
MCLV	Minehead Coastal Lower Value
MTA	Market Town Area
NHS	National Health Service
NHSCR	National Health Service Central Register
NINO	National Insurance Number
NOMIS	National Online Manpower Information System
NP	Northern Peninsula
NPPF	National Planning Policy Framework
ONS	Office for National Statistics
p.a.	Per Annum
PRDS	Patient Register Data Service
SHLAA	Strategic Housing Land Availability Assessment
SHMA	Strategic Housing Market Assessment
SM	South Molton
SMA	Sub-market Areas
UA	Unitary Authority
UC	Universal Credit
VOA	Valuation Office Agency

1. Introduction

Context and approach

1.1 The National Planning Policy Framework (NPPF), Paragraph 159 establishes that Local Planning Authorities should have a clear understanding of housing requirements in their area. This should be achieved by means of a Strategic Housing Market Assessment (SHMA) which should identify over the plan period the scale and mix of housing and the range of tenures the local population is likely to require. The Assessment should:

- meet household and population projections, taking into account migration and demographic change;
- address the need for all types of housing, including affordable housing and the needs of different groups in the community;
- and cater for all types of housing demand.

1.2 The Northern Peninsula (NP) Strategic Housing Market Assessment, which included the West Somerset planning authority, was published in December 2008 and provided an insight into the operation of local housing markets at the time and in the future. This report provides, for the West Somerset Council area, an Update to the NP SHMA, and within the following policy context. It takes account of the West Somerset Local Planning Authority area, which forms a part of the larger district council. In addition, it considers the potential impact on the housing market of the construction of the Hinkley Point C nuclear power station which is located within the West Somerset Council and Local Planning Authority Areas.

1.3 With the removal of the regional tier of planning and the revocation of Regional Spatial Strategies, and under the auspices of Localism, a key change has been the opportunity for local planning authorities to establish the appropriate level of future housing to be delivered in their area. Additionally, the NPPF has reshaped the face of national planning policy. This has consequently altered the scope of what might need to be covered in the development plan. Significantly, it has also altered the approach to development plan preparation, moving to the preparation of a Local Plan rather than a Local Development Framework. In doing so, it has changed the expectations of what should be contained within, and covered by, the development plan; in particular intimating that authorities prepare a more comprehensive strategic Local Plan document.

1.4 West Somerset Council is preparing the replacement to their existing development plans. The replacement development plan, the West Somerset Local Plan to 2032 will set out a vision and objectives on how the area should develop in the future, including locally derived housing figures, and offer planning policies, proposals and allocations to guide development across the local planning authority area up to 2032.

1.5 The Council is currently working with the community to produce a new set of planning policies for the parts of the District outside the Exmoor National Park which, once adopted, will replace many of the saved policies of the West Somerset District Local Plan, which was adopted in 2006.

1.6 The starting points for the new Local Plan are the vision and aims of the West Somerset Sustainable Community Strategy, together with information from research and data about the way the economy, communities, services and environment are currently functioning within the area. The preferred Core Strategy was subject to public consultation for an eight week period, between 22nd March and 16th May 2012.

1.7 The preparation of the development plan needs to be supported by robust and credible evidence to demonstrate that the policies and proposals within it are 'sound'. To this end, the setting of any locally derived housing policies will need to be supported by up-to-date and proportionate evidence to demonstrate that the selected approach is sound. The West Somerset Update to the Strategic Housing Market Assessment will form a key piece of evidence to facilitate this.

1.8 The Update will constitute a key evidence-base document to support the preparation of future housing policies for the Local Plan and to feed into other housing, planning, regeneration and economic strategies and interventions. It will inform strategic housing requirements for each district in the absence of strategic housing requirements previously provided via a Structure Plan and/or a Regional Spatial Strategy.

1.9 The Update will form key evidence to support the Local Plan and will be a pivotal contributor to demonstrating its soundness. National Practice Guidance also advocates that Strategic Housing Market Assessments are monitored and updated on a regular basis.

1.10 In accordance with government guidance on Housing Market Assessment, the approach adopted makes maximum use of existing and available demographic, social and housing data to identify the dynamics of the local housing market; the 'choices' available to local people; the imbalances between need, demand and supply which constrain those choices and the projected future requirement for housing.

1.11 The following table summarises the Core Outputs, which are drawn from CLG SHMA Practice Guidance, and the associated Key Questions, which inform the structure of the Update.

Table 1.1: key research questions and CLG core outputs of the update

Chapter	Key Research Questions	CLG Core Outputs
2	Who lives in the area, how might this change over the next 20 years? What other key influences and drivers are at work in relation to the housing market?	Estimates of current and future population and household size and profile by age and type. Description of key drivers underpinning the housing market.
3	What choices do consumers have in the housing market?	Analysis of past and current housing market trends, including the balance between supply and demand in different sectors.
4	What is the current pattern of housing need and demand for housing? How affordable is housing?	Estimates of current number of households in housing need.
6	What is the future need and demand for affordable and market housing by type and tenure, and for those with different requirements?	Estimates of future households that will require affordable housing and the size they will require. Estimates of household groups who have particular requirements, for example, families, young people, older people, key workers, black and minority ethnic groups, disabled people, etc.

1.12 Housing Market Assessments have typically provided static outputs, which are incapable of being amended as circumstances change. Completion of the Update has involved the development of a version of Housing Vision's dynamic and interactive Housing Requirements Toolkit, which is capable of assessing the requirement for housing arising from household growth. The application of the Toolkit is fully described in Chapter 5. This dynamic approach to the Housing Market Assessment also includes the opportunity for affordability modelling through the application of a related Housing Options Toolkit. This allows for bespoke affordability testing of any housing option by type, bed space and tenure.

Data sources

1.13 The approach adopted in undertaking this Update places a primary reliance on secondary data. The benefit of such an approach is the opportunity it offers for continual updating, enabling the monitoring of housing markets directly in the future by housing and planning officers. The many data sources used are listed below accompanied by appropriate weblinks:

Table 1.2: data sources consulted in order of use

Name of source	Origin	Web address
Census data 2001 and 2011	NOMIS	https://www.nomisweb.co.uk/Default.asp
ONS mid-year population estimates 2010, including components of population change	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-231847
ONS 2010-based subnational population projections	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-246448
Annual Population Survey for 2008 (commuting)	NOMIS	https://www.nomisweb.co.uk/articles/554.aspx
CLG 2008-based subnational population projections	CLG	http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates/
English Indices of Multiple Deprivation 2010	CLG	http://www.communities.gov.uk/publications/corporate/statistics/indices2010
English Indices of Multiple Deprivation 2010	CLG	http://www.communities.gov.uk/publications/corporate/statistics/indices2010
Annual Survey of Hours and Earnings (ASHE)	NOMIS	https://www.nomisweb.co.uk/Default.asp
CACI PayCheck Profile data for gross household incomes by district and postcode	CACI	http://www.caci.co.uk/
Housing Benefit and Council Tax recipients	DWP	http://statistics.dwp.gov.uk/asd/asd1/hb_ctb/hbctb_release_aug12.xls
Patient Register Data Service (PRDS), the National Health Service Central Register (NHSCR) and Higher Education Statistics Agency (HESA)	ONS	http://www.ons.gov.uk/ons/publications/re-reference-tables.html?edition=tcm%3A77-218545
Labour Force Survey (LFS) 2001	Business Information & Skills (BIS)	http://www.education.gov.uk/rsgateway/DB/VOL/v000303/index.shtml
Land Registry property price post-coded data	Land Registry	http://epsiplatform.eu/content/uk-land-registry-releases-data-free-charge
Valuation Office Agency (VOA) data on private rents	VOA	http://www.voa.gov.uk/corporate/statisticalReleases/120126_PrivateRentalMarket.html
Private rental data	findaproperty.com	http://www.findaproperty.com/search-tools/
	rightmove.co.uk	http://www.yourrightmove.co.uk/
Housing Strategy Statistical Appendix (HSSA) data on affordable lettings, sales and completions	CLG	http://www.communities.gov.uk/publications/corporate/statistics/lahousing201011
COntinuous REcording of lettings and sales of social housing in England (CORE)	CLG	https://core.communities.gov.uk/

Name of source	Origin	Web address
Rough Sleeping Statistics	CLG	http://www.communities.gov.uk/publications/corporate/statistics/roughsleepingautumn2011
Homefinder Somerset affordable housing stock, applications and lettings data	Homefinder Somerset	http://www.devonhomechoice.com/Data/ASPPages/1/2.aspx
Registered provider housing stock, applications and lettings data	Affordable Housing UK Devon and Cornwall Housing Association Falcon Rural Housing Association Hastoe Housing Association Magna Housing Association West Somerset Homes Sanctuary Housing Tarka Housing West Country Housing Association	
Housing completions and empty and second homes data	West Somerset Councils	

Accuracy and rounding

1.14 Please note that where percentages have been rounded this is indicated in the text, and where applied, cumulative totals may slightly exceed or fall below 100%.

Boundaries

1.15 West Somerset Council is only responsible for spatial and land-use planning within the Local Planning Authority Area (LPA). This excludes those parts of the Exmoor National Park (ENP) which fall within the District Council's boundaries. In order to identify with accuracy the demographic profile of the LPA area, including household numbers and projections on which housing projections are based, it has been necessary to undertake an exercise which splits Census data for Census Output Areas which intersect the boundaries between the Exmoor National Park and the West Somerset LPA as follows.

1.16 The boundaries between the ENP and LPA have been drawn in a Geographical Information System (GIS) using the West Somerset Council boundary from Ordnance Survey's Boundary Line and the Exmoor National Park boundary downloaded from the Natural England website. GIS 'queries' were run to establish which Census Output Areas intersect each area. These were exported to Excel to enable calculations to ascertain which Census Output Areas intersect both areas.

1.17 The result was that 28 Census Output Areas intersect both areas. The number of households was recorded for each of these Census Output Areas from the 2011 Census data. A map was created for each of the 28 intersecting Census Output Areas and a number of households and/or a percentage - usually for the least populated side of the Census output area was calculated. This was undertaken by counting the number of buildings in the least populated side using the 1:10,000 raster map 'Streetview' from Ordnance Survey Open Data. The number of buildings was counted for both sides of the Census Output Area where it was more equally distributed and an estimate made for the percentage that falls on each side.

1.18 12 of the 28 Census Output Areas were estimated to have 100% of their households in only one of the areas. This is either because the Census Output Area only touches or slightly intersects with the boundaries or because the part of the Census Output Area that is in another area appears not to contain any buildings according to the 1:10,000 Streetview Ordnance survey raster map. The splits of population and households for the remaining 16 Census Output Areas were then confirmed or amended on the basis of local knowledge provided by the Council's Principal Planning Officer (Policy).

1.19 The Update states where data has been presented to either the DC or LPA areas, the term ‘West Somerset’ has been used to apply to the DC area only.

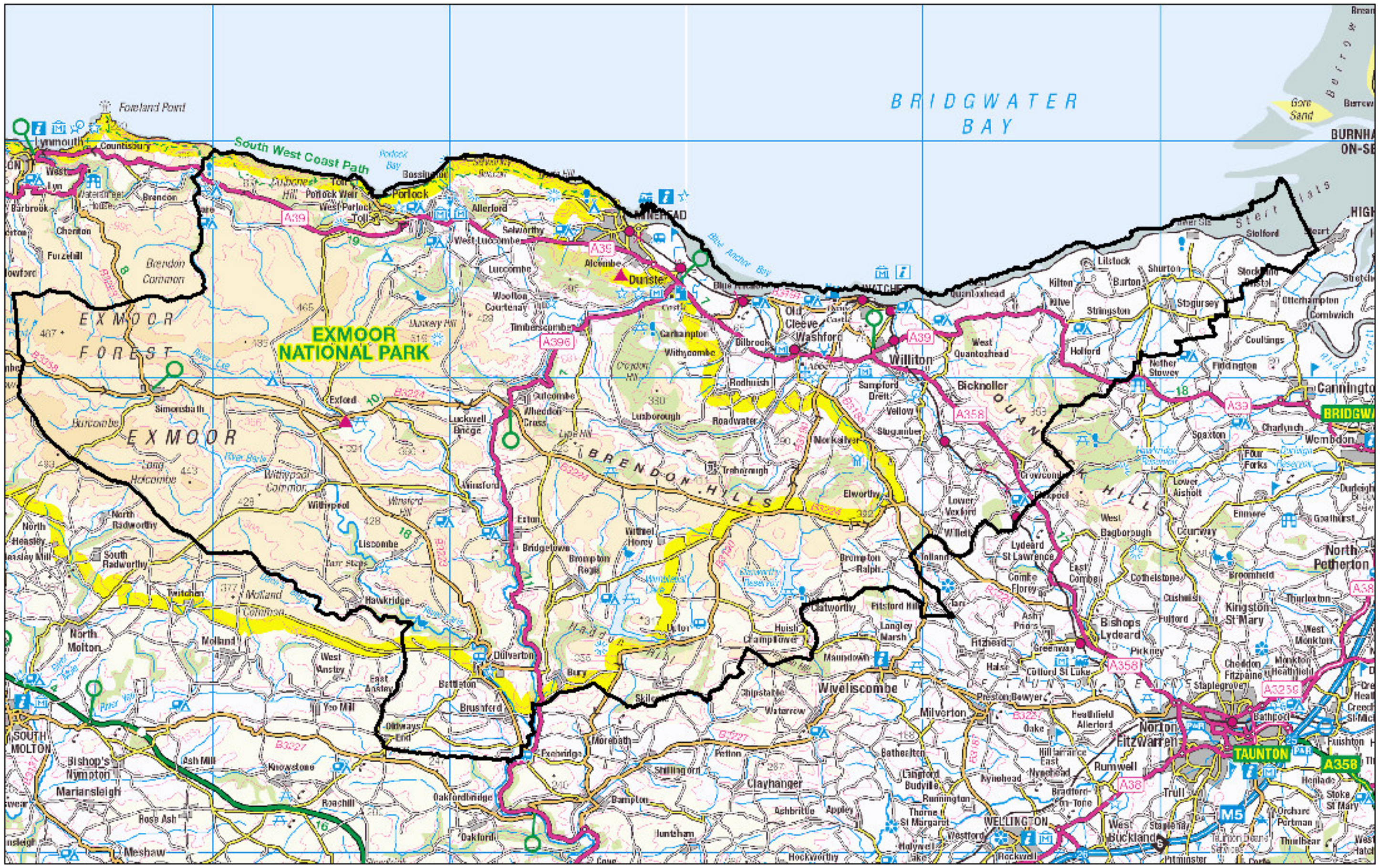
1.20 Data is collected and collated according to a range of boundaries, which seldom conform to each other. The requirement is to achieve the best-fit possible and the boundaries applied in this Update are summarised in the table below by data used.

Table 1.3: boundaries used by data in the SHMA Update

Boundary	Data	Source
West Somerset Council and Local Planning Authority areas	Age structure Ethnic origin Household composition Occupation Year of arrival UK Accommodation type Tenure type Number of rooms Rooms, average household size and Occupancy Rating (Overcrowding) Number of bedrooms Under-occupation (Occupancy Rating) Vacant homes	ONS Census 2011
West Somerset Council area	Internal migration, international migration and travel to work	ONS
	Incomes data	CACI
	Property price data	Land Registry
	Private rental data	VOA, rightmove.com and, findaproperty.com
	Household deprivation Affordable lettings, sales and completions data	CLG
	Affordable housing stock, applications and lettings data	Homefinder Somerset

1.21 Map 1.1 below identifies the West Somerset Council and Exmoor National Park boundaries. The West Somerset Local Planning Authority area excludes the District Council area which falls within the National Park area.

West Somerset



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2. Key Influences and Drivers

Introduction

2.1 This section reviews the key influences and drivers underpinning the housing market. It progresses from a demographic profile to a review of population and household projections and the factors influencing them including trends in international and internal migration and patterns of commuting. Some data from the 2011 Census has been used; however, where this is not yet available data from the 2001 Census has been used.

Demographic profile

Population by age band

2.2 Initial estimates from the 2011 Census identify a population of 34,675 in West Somerset and 15,623 households at an average household size of 2.1.

2.3 The area's population by age will influence household formation which in turn determines housing requirements. The following table summarises age structure by age band for the 2011 Census.

Table 2.1: age structure, 2011

Age band	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
Age 0 to 15	3,873	14.4	4,831	13.9	17.6	18.9
Age 16 to 17	578	2.2	741	2.1	2.4	2.5
Aged 18 to 24	1,984	7.4	2,436	7.0	8.9	9.4
Aged 25 to 44	5,003	18.6	6,165	17.8	24.6	27.5
Age 45 to 64	7,717	28.7	10,422	30.1	26.9	25.4
Age 65 plus	7,720	28.7	10,080	29.1	19.6	16.3
All Categories: Age Structure	26,875	100.0	34,675	100.0	100.0	100.0
Mean Age				47.7	41.6	39.3
Mean Age Rank				1		
Median Age				51	42	39
Median Age Rank				1		

Source: KS102EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk

Key findings:

- Compared with the region and nationally, the population in both the West Somerset LPA and West Somerset DC areas is older, especially at 65 plus. The mean age of 47.7 and median age of 51 for West Somerset DC rank first out of the 348 local authorities in England and Wales.

Household total, composition and size

2.4 The following tables below identify the composition and size of households in both West Somerset areas in the context of the South West and England

Table 2.2: household total and composition, West Somerset LPA and DC areas, 2011

Household composition	West Somerset LPA		West Somerset DC			South West	England
	No	%	No	%	Rank	%	%
One person household: Aged 65 and over	2,345	19.6	3,041	19.5	3	13.8	12.4
One person household: Other	1,688	14.1	2,171	13.9	289	16.5	17.9
One family only: All aged 65 and over	1,708	14.3	2,281	14.6	5	10.1	8.1
One family only: Married or same-sex civil partnership couple: No children	1,852	15.5	2,522	16.1	39	14.1	12.3
One family only: Married or same-sex civil partnership couple: Dependent children	1,283	10.7	1,632	10.4	340	14.7	15.3
One family only: Married or same-sex civil partnership couple: All children non-dependent	517	4.3	712	4.6	311	5.2	5.6
One family only: Cohabiting couple: No children	550	4.6	713	4.6	276	5.6	5.3
One family only: Cohabiting couple: Dependent children	421	3.5	527	3.4	289	3.9	4.0
One family only: Cohabiting couple: All children non-dependent	52	0.4	69	0.4	248	0.4	0.5
One family only: Lone parent: Dependent children	515	4.3	650	4.2	341	5.9	7.1
One family only: Lone parent: All children non-dependent	332	2.8	419	2.7	318	2.9	3.5

Other household types: With dependent children	189	1.6	240	1.5	318	1.9	2.6
Other household types: All full-time students	0	0.0	0	0.0	337	0.6	0.6
Other household types: All aged 65 and over	89	0.7	107	0.7	2	0.3	0.3
Other household types: Other	422	3.5	539	3.5	153	4.0	4.5
All categories	11,962	100.0	15,623	100.0		100.0	100.0

(Source: Table KS105EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/

Key Findings

- West Somerset DC ranked 3rd out of the 348 local authorities in England and Wales for Single households over 65. Almost one fifth (19.6%) of households in West Somerset LPA and in West Somerset DC (19.5%) were of this type compared with 13.8% in the South West and 12.4% nationally.

- West Somerset DC ranked 5th out of the 348 local authorities in England and Wales for One family only households with all people aged over 65. 14.6% of households in West Somerset DC were of this type compared with 10.1% in the South West and 8.1% nationally. 14.3% of households in the West Somerset LPA area were of this type.

- West Somerset DC ranked 2nd out of the 348 local authorities in England and Wales for Other types of household all aged over 65. 0.7% of households in both West Somerset LPA and West Somerset DC areas were of this type compared with 0.3% in both the South West and nationally.

- West Somerset DC ranked thirty ninth out of 348 local authorities in England and Wales for One family only: married or same-sex civil partnership couple: no children. 16.1% of households in West Somerset were of this type compared with 14.1% in the South West and 12.3% nationally.

- All other types of household had lower percentages in West Somerset than in the South West and nationally except Cohabiting couples with non dependent children where the percentage was small (0.4%) and was the same in the South West though slightly higher nationally (0.5%).

2.5 The following table profiles household size for both areas.

Table 2.3: household size, West Somerset LPA and DC areas, 2011

Number of people in household	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
1 person	4,033	33.7	5,212	33.4	30.3	30.2
2 people	4,833	40.4	6,432	41.2	37.1	34.2
3 people	1,388	11.6	1,824	11.7	14.5	15.6
4 people	1,097	9.2	1,404	9.0	12.3	13.0
5 people	419	3.5	513	3.3	4.1	4.7
6 people	129	1.1	165	1.1	1.3	1.7
7 people	47	0.4	54	0.3	0.3	0.4
8 or more people	17	0.1	19	0.1	0.2	0.3
All categories: household size	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table KS 105 EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/

Key findings

- Just over one third in both the West Somerset LPA area (33.7%) and West Somerset DC area (33.4%) were 1 person households. This was higher than in the South West (30.3%) and nationally (30.2%).

- Just over two fifths in both the LPA (40.4%) and DC areas (41.2%) were 2 person households which was higher than in the South West (37.1%) and nationally (34.2%).

- There were lower percentages of 3, 4 and 5 person households in both areas than in the South West and nationally. Combined, these make up 24.3% in the LPA area and 23.9% in the DC area compared with 30.9% in the South West and 33.2% nationally.

- Households with 6 or more persons were slightly lower in the LPA area (1.7%), DC area (1.5%) and the South West (1.7%) than nationally (2.4%).

Ethnicity

2.6 This table provides 2011 Census data for ethnic origin.

Table 2.4: ethnic origin, West Somerset LPA and DC areas, 2011

	West Somerset LPA		West Somerset DC			South West	England
Ethnic origin	**No**	**%**	**No**	**%**	**Rank**	**%**	**%**
White: English/Welsh/ Scottish/Northern Irish/ British	25,635	95.4	33,229	95.8	53	91.8	79.8
White: Irish	130	0.5	153	0.4	262	0.5	1.0
White: Gypsy or Irish Traveller	12	0.0	14	0.0	281	0.1	0.1
White: Other White	724	2.7	832	2.4	201	3.0	4.6
Mixed/multiple ethnic group: White and Black Caribbean	60	0.2	78	0.2	298	0.5	0.8
Mixed/multiple ethnic group: White and Black African	25	0.1	27	0.1	305	0.2	0.3
Mixed/multiple ethnic group: White and Asian	60	0.2	71	0.2	321	0.4	0.6
Mixed/multiple ethnic group: Other Mixed	24	0.1	32	0.1	346	0.3	0.5
Asian/Asian British: Indian	28	0.1	32	0.1	342	0.6	2.6
Asian/Asian British: Pakistani	2	0.0	2	0.0	344	0.2	2.1
Asian/Asian British: Bangladeshi	24	0.1	25	0.1	263	0.2	0.8
Asian/Asian British: Chinese	23	0.1	26	0.1	347	0.4	0.7
Asian/Asian British: Other Asian	88	0.3	107	0.3	260	0.5	1.5
Black/African/Caribbean/Black British: African	9	0.0	10	0.0	346	0.5	1.8
Black/African/Caribbean/Black British: Caribbean	6	0.0	7	0.0	341	0.3	1.1
Black/African/Caribbean/Black British: Other Black	3	0.0	3	0.0	340	0.2	0.5
Other ethnic group: Arab	7	0.0	9	0.0	308	0.1	0.4
Other ethnic group: Any other ethnic group	16	0.1	18	0.1	339	0.2	0.6
All Categories: Ethnic Origin	26,875	100.0	34,675	100.0		100.0	100.0

(Source: Table KS201EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/

Key findings:

- Both the West Somerset LPA and DC areas have very small non-White ethnic population, 1.4% and 1.3% of the total respectively, compared with 4.6% for the South West and 14.3% for England.

- Both areas have small White Other ethnic populations, 2.7% and 2.4% of the total respectively, lower than in the South West (3.0%) and the national figure (4.6%).

- In circumstances of very low ethnic populations, their social, economic and housing circumstances can only be understood through detailed and localised analysis; it is not possible to generalise from studies undertaken with concentrated ethnic populations.

- The 2011 Census identified only 14 households that were White Gypsies or Irish Travellers in West Somerset.

Occupational profile

2.7 Profiling Occupation Groups is useful as it indicates from a hierarchy of skills and qualifications, the likely associated income levels of the employed population. Incomes are dealt with specifically in subsequent sections. The following tables use Census data profile the occupation of usual residents aged 16 to 74.

Table 2.5: occupation: usual residents aged 16 to 74, West Somerset LPA and DC areas, 2011

Occupation	West Somerset LPA		West Somerset DC			South West	England
	No	%	No	%	Rank	%	%
1. Managers, directors and senior officials	1,362	11.6	1,929	12.6	82	11.1	10.9
2. Professional occupations	1,330	11.3	1,801	11.7	321	16.5	17.5
3. Associate professional and technical occupations	1,041	8.9	1,361	8.9	341	12.1	12.8
4. Administrative and secretarial occupations	1,027	8.8	1,300	8.5	341	11.0	11.5
5. Skilled trades occupations	1,970	16.8	2,793	18.2	8	13.4	11.4
6. Caring, leisure and other service occupations	1,531	13.1	1,896	12.3	9	9.8	9.3

7. Sales and customer service occupations	904	7.7	1,114	7.3	252	8.4	8.4
8. Process, plant and machine operatives	767	6.5	936	6.1	233	6.7	7.2
9. Elementary occupations	1,799	15.3	2,225	14.5	34	11.0	11.1
All Categories: Occupation	11,732	100.0	15,355	100.0		100.0	100.0

(Source: KS608EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk
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Key findings:

- The 2011 Census identifies that the highest percentage of usual residents aged 16 to 74 in the West Somerset LPA area was in the Skilled trades occupations category (16.8%) followed by Elementary occupations (15.8%). The next highest category was Caring, leisure and other service occupations (13.1%) followed by Managers, Directors and senior officials (11.6%) and Professional occupations (11.3%). The remainder of categories had less than 10% with the lowest one being Process, plant and machines operatives with 6.5%.

- According to the 2011 Census, the highest percentage of usual residents aged 16 to 74 in West Somerset DC were classed as Skilled trades occupations (18.2%); the next highest was Elementary occupations (14.5%); the next highest was Managers, directors and senior officials (12.6%) and the next highest was Caring, leisure and other service occupations (12.3%) followed by Professional occupations (11.7%). The remainder of categories had less than 10%, with the lowest numbers being Process, plant and machine operatives (6.1%).

- Skilled trades occupations were higher in both West Somerset LPA (16.8%) and West Somerset DC areas (18.2%) than in the South West (13.4%) and nationally (11.4%), and West Somerset DC ranked 8th highest out of 348 local authorities in England and Wales.

- Caring, leisure and other service occupations ranked 9th highest out of 348 local authorities in England and Wales for the DC area and had a higher percentage (12.3%) than in the South West (9.8%) and nationally (9.3%).

- Elementary occupations was higher in both West Somerset LPA (15.3%) and West Somerset DC areas (14.5%) than in the South West (11.0%) and nationally (11.1%), and West Somerset DC ranked 34th out of 348 local authorities in England and Wales.

- Managers, directors and senior officials in West Somerset DC (12.6%) was a little higher than in the South West (11.1%) and nationally (9.3%) and ranked 82nd out of 348 local authorities in England and Wales. It was also a little higher in West Somerset LPA (11.6%).

- The remainder of occupations in both West Somerset LPA and West Somerset DC had lower percentages than in the South West and nationally and West Somerset DC ranked between 233 and 341 out of 348 local authorities in England and Wales.

- No data is provided on incomes in these tables but, as the groups are presented as a hierarchy from higher to lower skills and qualifications, it can be assumed that income from earnings follows a similar pattern. In that case, West Somerset DC has lower proportions of higher skilled, qualified and salaried groups 1 to 3 (33.2%) than regionally (39.7%) or nationally (41.2%); and more in groups 4 to 9 (66.9%) compared with 60.3% in the South West and 58.9% nationally according to the 2011 Census data. This implies that local people are likely to be at a disadvantage in terms of their incomes in a high value housing market.

Car and van availability

2.8 The following table show the availability of cars or vans and the sum of all cars/vans in both areas.

Table 2.6: car or van availability, West Somerset LPA and DC areas, 2011

Availability	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
No cars or vans in household	2,322	19.4	2,754	17.6	18.9	25.8
1 car or van in household	5,455	45.6	7,034	45.0	43.5	42.2
2 cars or vans in household	3,051	25.5	4,199	26.9	28.3	24.7
3 cars or vans in household	792	6.6	1,142	7.3	6.7	5.5
4 or more cars or vans in household	342	2.9	494	3.2	2.6	1.9
All categories: Car or van availability	11,962	100.0	15,623	100.0	100.0	100.0
sum of All cars or vans in the area	15,497		21,127			

(Source: KS416EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk
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Key findings

- Nearly one fifth (19.4%) of households in the West Somerset LPA area had no cars or vans in their household compared with 17.6% in the West Somerset DC area, 18.9% in the South West and just over one quarter (25.4%) nationally.

- There was an average of 1.3 cars or vans per household in the West Somerset LPA area compared with 1.4 in the West Somerset DC area; 1.3 in the South West and 1.1 nationally.

- There was a higher percentage of households with one car in both the West Somerset LPA (45.6%) and West Somerset DC areas (45.0%) than in the South West (43.5%) and nationally (42.2%).

- There was a higher percentage of households with two cars in both the West Somerset LPA (25.5%) and West Somerset DC areas (26.9%) than nationally (24.7%), but lower than in the South West (28.3%).

- 9.5% of households in the West Somerset LPA area had 3 or more cars compared with 10.5% in West Somerset DC area, 9.3% in the South West and 7.4% nationally.

Household incomes from all sources

2.9 Household income is the most important factor in determining access to housing. The following table profiles the proportion of households receiving gross incomes across a range of income bands. It is important to emphasise that this profile includes income from all sources, including social security benefits, and is for all household types. This data has been applied in the Housing Requirements Toolkit.

Table 2.7: gross household income, West Somerset, percentages, August 2012

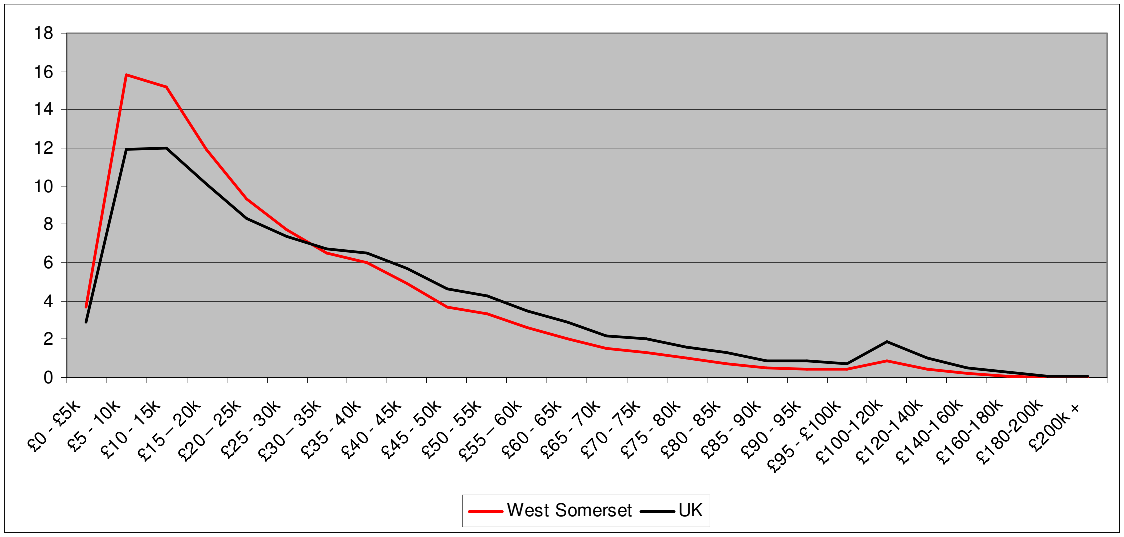
Income band	West Somerset %	United Kingdom
£0 - £5k	3.7%	2.9%
£5 – 10k	15.8%	11.9%
£10 - 15k	15.2%	12.0%
£15 – 20k	11.9%	10.1%
£20 – 25k	9.3%	8.3%
£25 - 30k	7.7%	7.4%
£30 – 35k	6.5%	6.7%
£35 - 40k	6.0%	6.5%
£40 - 45k	4.9%	5.7%
£45 - 50k	3.7%	4.6%
£50 - 55k	3.3%	4.3%
£55 – 60k	2.6%	3.5%
£60 - 65k	2.0%	2.9%
£65 - 70k	1.5%	2.2%
£70 - 75k	1.3%	2.0%
£75 - 80k	1.0%	1.6%
£80 - 85k	0.7%	1.3%
£85 - 90k	0.5%	0.9%
£90 - 95k	0.4%	0.9%
£95 - £100k	0.4%	0.7%
£100-120k	0.9%	1.9%
£120-140k	0.4%	1.0%
£140-160k	0.2%	0.5%
£160-180k	0.1%	0.3%
£180-200k	0.0%	0.1%
£200k +	0.0%	0.1%
Mean income	£28,650	£35,902
Median income	£21,837	£28,318
Lower quartile	£11,810	£14,273

(Source: PayCheck data, CACI, August 2012)

Key findings:

- West Somerset has a predominantly low income distribution and associated high level of dependence on low incomes. The mean household income is 20.2% below the UK average and the typically lower income range is most clearly seen in the following chart.

Fig 2.1: gross household income, West Somerset and the UK, percentages, August 2012



(Source: PayCheck Data, CACI, August 2012)

Personal incomes from employment

2.10 The Annual Survey of Hours and Earnings (ASHE) identifies the gross weekly pay of full-time workers at mean and median levels and for each 10th percentile of the income range by local authority area and is produced annually.

2.11 West Somerset has a significant proportion of its work-force which is self-employed. Using the equation; Employee Employment (EE) + Self-Employment (SE) = Total Employment (TE) and the data in the 2011 Census Table KS601EW (Key Statistics: Economic Activity) this equates to 27.15% for the district as a whole which compares with 18.81%, 17.56% and, 15.71% for Somerset, the South West and England respectively. The following table summarises gross median weekly incomes for residents in West Somerset in 2012, the most recent year for which data is available, and includes an estimate adjusted for the self-employed

Table 2.8: gross median weekly incomes for residents in West Somerset, 2012

Category of employee	West Somerset	South West	England
Full-time	£393.7	£473.4	£507.6
Self-employed	£338.58	£407.12	£436.54

(Source: ONS Annual Survey of Hours and Earnings – resident analysis, NOMIS website, http://www.nomisweb.co.uk/.
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Key findings:

- Data on gross median incomes from employment show substantially lower incomes in West Somerset than the regional averages or national averages.

- Full-time incomes in West Somerset are only 83% of the regional and 78% of the national average.

- These findings suggest high levels of dependence on low incomes in West Somerset.

2.12 West Somerset has a significant proportion of its work-force which is self-employed. Using the equation; Employee Employment (EE) + Self-Employment (SE) = Total Employment (TE) and the data in the 2011 Census Table KS601EW (Key Statistics: Economic Activity) this equates to 27.15% for the district as a whole which compares with 18.81%, 17.56% and, 15.71% for Somerset, the South West and England respectively.

2.13 ASHE data is confined to employee-employment sources only. A recent report suggested that in 2012, average self-employed earnings were 14% lower than their employee-employment equivalents.[1] Applied on a uniform basis, and with no local variations, the average gross weekly earnings data for the self-employed in Table 2.8 would equate to £338.58, £407.12 and, £436.54 for West Somerset, South-West and England respectively.

Personal incomes from benefits

2.14 The following tables summarise the number and proportion of key working age benefit claimants, working age refers to the age group 16-64, Key Findings are provided after the second table.

Table 2.9: residents in receipt of working age benefits, West Somerset, February 2012

Type of Benefit	West Somerset		South West		England	
	No	**%**	**No**	**%**	**No**	**%**
Job Seeker	450	16.9	96,420	23.1	1,356,640	27.5
Employment Support Allowance and Incapacity Benefits	1,380	51.7	192,690	46.1	2,094,880	42.5
Lone Parent	180	6.7	37,460	9.0	506,980	10.3
Carer	270	10.1	35,370	8.5	404,270	8.2
Others on income related benefit	120	4.5	13,090	3.1	146,230	3.0
Disabled	240	9.0	35,960	8.6	354,050	7.2
Bereaved	40	1.5	6,530	1.6	66,010	1.3
Total	2,670	100.0	417,530	100.0	4,929,050	100.0
Out of Work Benefits	**2,120**	**79.4**	**339,670**	**81.4**	**4,104,730**	**83.3**

[1] Centre for Economic and Business Research; Step Change Consumer Debt and Money Report Q3 2012; Step Change; 2012; pp.9 – 10 (Self-employed face highest debt burden). See:- http://www.stepchange.org/Portals/0/Documents/media/reports/cebr%20q3%202012.pdf

(Source: DWP benefit claimants - working age client group, NOMIS website, http://www.nomisweb.co.uk/.
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Key findings

- DWP data shows that there were 2,670 working age people claiming benefits and that of these, more than three quarters (79.4%) were claiming Out of Work Benefits. This was a lower percentage than in the South West (81.4%) and nationally (83.3%).

- ONS Claimant counts for November 2012 show a lower percentage of JSA claimants in West Somerset (1.9%) than in the South West (2.6%) and Great Britain overall (3.8%).

Relative levels of deprivation

2.15 The **English Indices of Deprivation** 2010 are a relative measure of deprivation showing whether one small area is more or less deprived than another small area in England but not by how much. It is based on ONS Lower Super Output Areas of which there are 32,482 in England. The National Rank is used in the maps throughout this section and ranks all the Domains of deprivation from 1 (most deprived) to 32,482 (least deprived). The English Indices of Deprivation are able to show where there are pockets of high relative deprivation within a local authority compared to other small areas in England. The English Indices of Deprivation 2010 is made up as follows:

- Index of Multiple Deprivation (IMD)

Domains

- Income Domain
- Employment Domain
- Health & Disability Domain
- Education, Skills and Training Domain
- Crime Domain
- Living Environment Domain
- Housing and Barriers to Services Domain

Sub-Domains

- Indoors Living Sub Domain
- Outdoors Living Sub Domain
- Wider Barriers Sub Domain
- Geographical Barriers Sub Domain
- Skills Sub Domain

- Children and Young People Sub Domain

Supplementary Income Indexes

- Income Deprivation for Older People Index
- Income Deprivation for Children Index

2.16 Although there is no single measure that enables England's 326 district local authorities to be compared, local authority District Summaries provide an indication of comparative deprivation. The following table provides the rank and scores of the LSOAs for each District and is population weighted.

Table 2.10: extract from local authority district summaries ID2010

District	Rank of Average Rank	Rank of Average Score
West Somerset	45	90

(Source: ID2010 District Summaries, CLG website, http://www.communities.gov.uk/corporate/.
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Key findings:

- West Somerset is in the 14% most deprived local authorities for Rank of Average Rank and the 28% most deprived for Rank of Average Score.

2.17 The **Index of Multiple Deprivation** is a measure of multiple deprivation at the small area level and is based on the idea of distinct dimensions of deprivation which can be recognised and measured separately. People may be counted as deprived in one or more of the dimensions depending on the number of types of deprivation that they experience. The overall Index of Multiple Deprivation is a weighted area-level aggregation of these specific dimensions of deprivation (i.e. the seven Domains of Deprivation).

2.18 The following maps and tables examine patterns for those Domains and sub-Domains of most relevance to understanding the need and demand for housing, they are accompanied by maps highlighting specific locations of concern as appropriate in relation to the following:

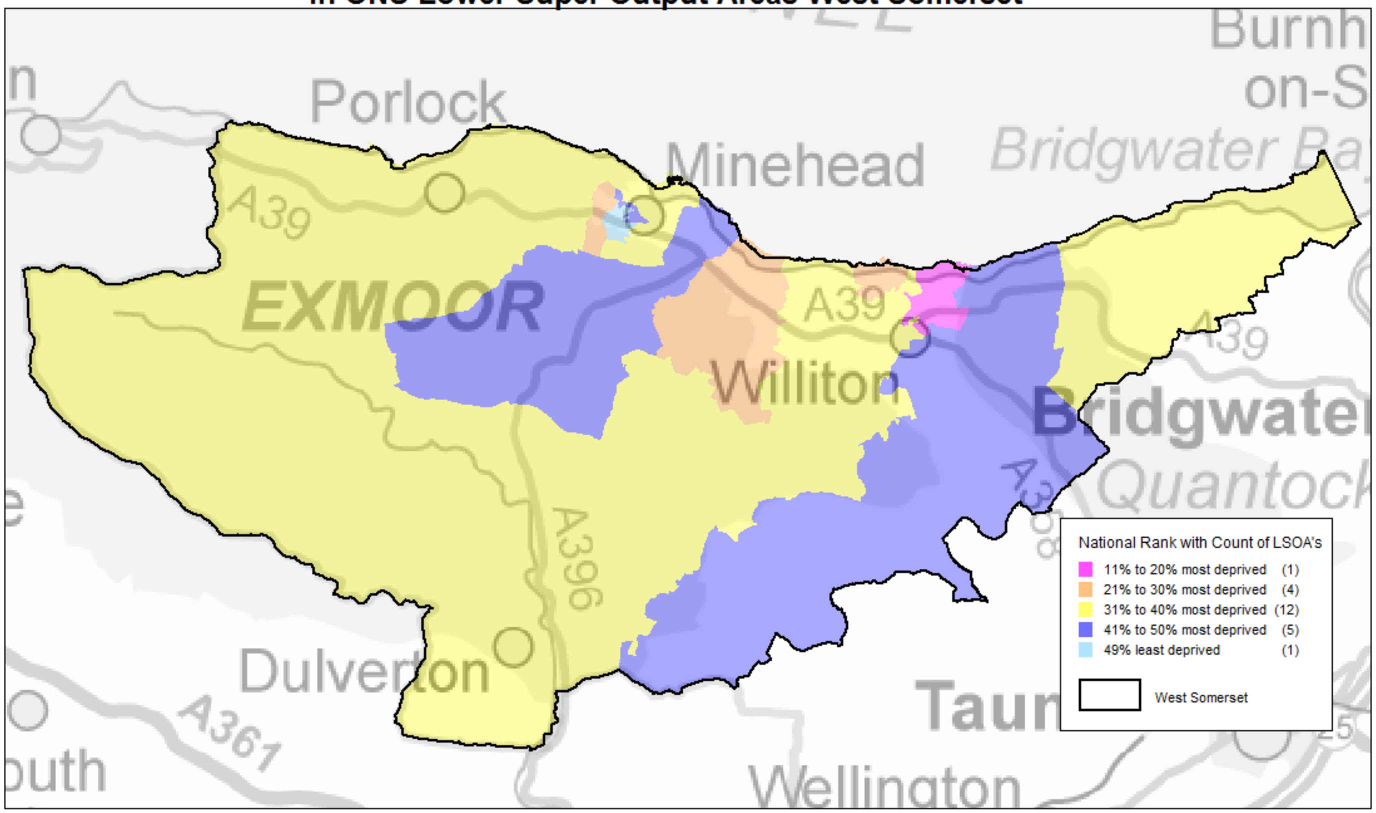
- the overall Index of Multiple Deprivation;
- Income Domain and the supplementary Income Deprivation Affecting Older People Index (affecting affordability issues for housing) ;
- Living Environment Domain and Indoors Living Sub Domain which is concerned with measuring the quality of housing (stock condition and lack of central heating); and
- Barriers to Housing and Services Domain, and associated Geographical Barriers Sub-Domain, which shows access to services and the Wider

Barriers Sub-Domain which includes housing indicators (overcrowding, homelessness and access to owner occupation)

2.19 The following maps show levels of relative deprivation for the Index of Multiple Deprivation using national rank in small areas in West Somerset.

Map 2.1

National Rank Index of Multiple Deprivation in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Key findings:

- There were no small areas in West Somerset in the 10% most nationally deprived for the Index of Multiple Deprivation, and only one small area in the 11% to 20% most nationally deprived showing relatively high deprivation.

- There were 4 small areas within the 21% to 30% most deprived nationally.

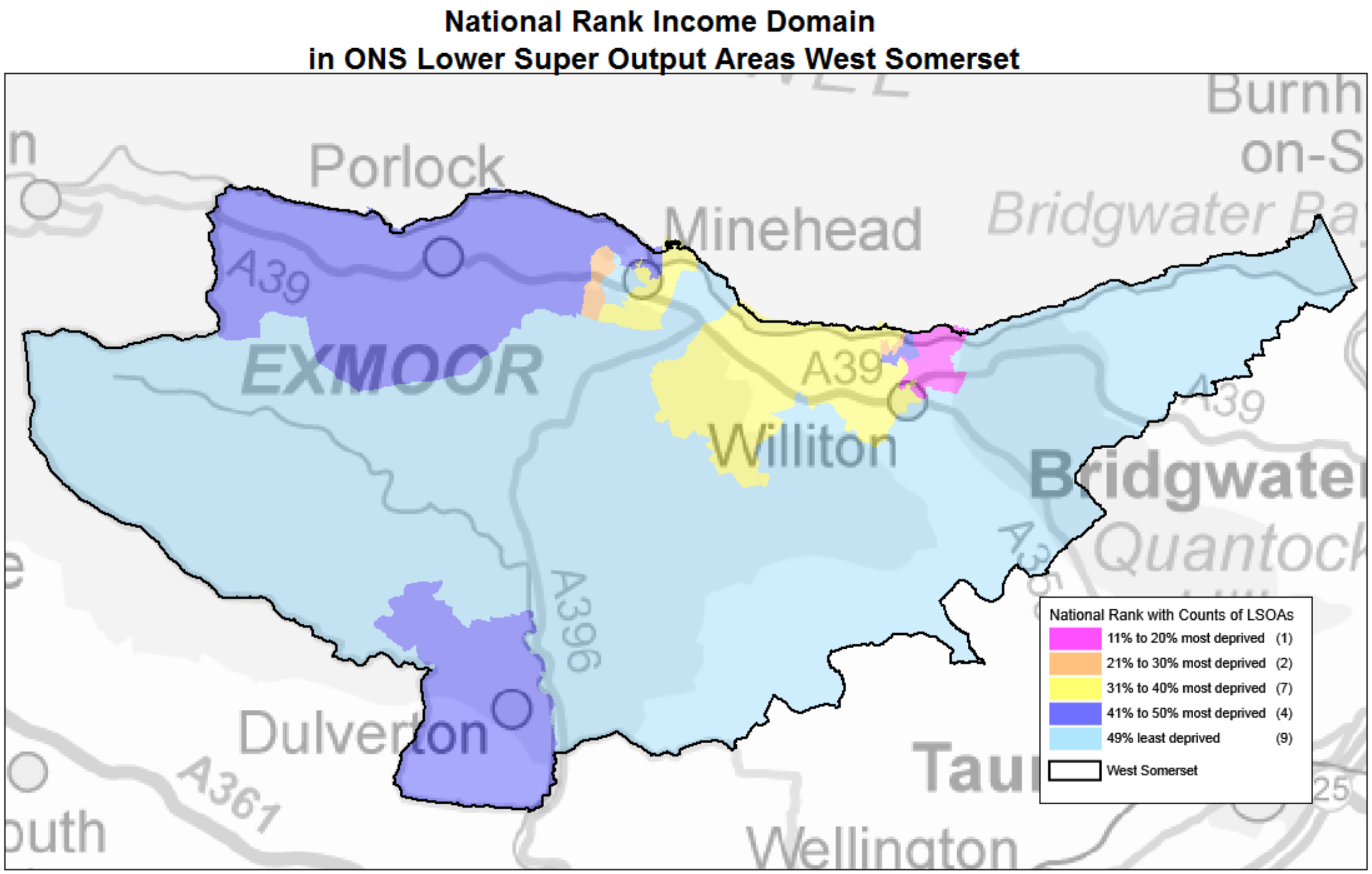
- There was only 1 small area in the 49% least deprived nationally for the Index of Multiple Deprivation therefore the majority of West Somerset was in the 50% most deprived nationally for the overall Index of Multiple deprivation.

2.20 The income Domain measures the proportion of people within each LSOA that are income deprived using the following measures:

- Adults and children in Income Support families;
- Adults and children in income-based Jobseeker's Allowance families;
- Adults and children in Pension Credit (Guarantee) families;
- Adults and children in Child Tax Credit families (who are not claiming Income Support, income-based Jobseeker's Allowance or Pension Credit) whose equivalised income (excluding housing benefits) is below 60% of the median before housing costs; and
- Asylum seekers in England in receipt of subsistence support, accommodation support, or both.

2.21 There are two supplementary indexes for income; these being Income Deprivation Affecting Older People Index and the Income Deprivation Affecting Children Index. The Income Deprivation Affecting Older People Index (IDAOP) is included in this report due to the high percentage of older people in the population of West Somerset and its potential to show housing affordability issues. This index represents income deprivation affecting older people as a proportion of living in income support or income based Job Seekers Allowance or Pension Credit Guarantee families. The following maps show relative deprivation for national rank for income deprivation and the income deprivation affecting older people index.

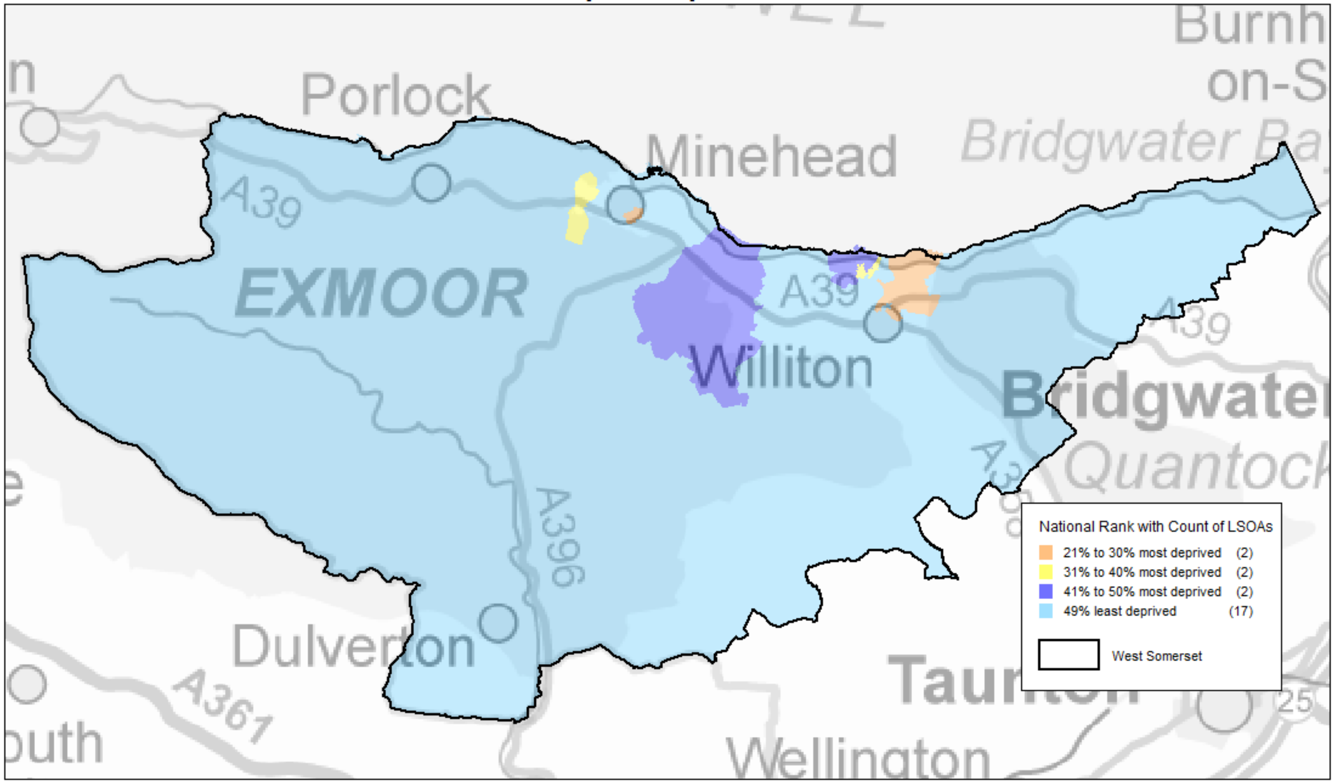
Map 2.2



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Map 2.3

National Rank Income Deprivation Affecting Older People Index in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Key findings:

- There were no small areas in West Somerset in the 10% most nationally deprived for income deprivation and only one small area in the 11% to 20% most deprived nationally showing relatively high deprivation.

- There were two small areas in the 21% to 30% most deprived nationally for the Income domain.

- There were 9 small areas in the 49% least deprived nationally not showing much relative income deprivation, although more than half of all the small areas (14) were in the 50% most relatively deprived nationally.

- There were no small areas with very high relative deprivation for the Index of Deprivation Affecting Older People Index being none in the top 20%, and there were only two small areas in the 21% to 30% most nationally deprived.

- Nearly three quarters of the small areas (17) in West Somerset were in the 49% least deprived for the Index of Deprivation Affecting Older People Index therefore there was not a really high level of relative deprivation for the IDAOP in West Somerset.

2.22 The Living Environment Domain combines the Indoors Living Sub Domain and the Outdoors Living Sub Domain. The sub Domains are combined so that the Indoors Living Sub Domain has two thirds of the weighting and the Outdoors Living Sub Domain has one third of the weighting. The sub domains are as follows:

- Sub-domain: The ‘indoors’ living environment:

  - Housing in poor condition: The proportion of social and private homes that fail to meet the decent homes standard.
  - Houses without central heating: The proportion of houses that do not have central heating.

- Sub-domain: The ‘outdoors’ living environment

  - Air quality: A measure of air quality based on emissions rates for four pollutants.
  - Road traffic accidents: A measure of road traffic accidents involving injury to pedestrians and cyclists among the resident and workplace population.

2.23 The Indoors Living Sub Domain contains housing indicators, and has been included in this analysis partly to see where there may be sub-standard housing and in how many areas, and also to see whether the deprivation in the Living Environment Domain may be caused by housing indicators. It should be borne in mind that the data is based on the 2001 Census 'lack of central heating' and the 2005 English House Condition Survey for 'poor condition of housing.' The following tables identify small areas which are in the 10% most deprived nationally for Living Environment and the Indoors Living Sub Domain.

Table 2.11: small areas in West Somerset in the 10% most nationally deprived for Living Environment Domain, 2010

ONS Lower Super Output Area Code	ONS Lower Super Output Area Name	Score	Rank
E01029338	West Somerset 005C	47.6	3,060

(Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk/corporate/.
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Table 2.12: Small Areas in West Somerset in the 10% most nationally deprived for Indoors Living Sub Domain 2010

ONS Lower Super Output Area Code	ONS Lower Super Output Area Name	Score	Rank
E01029338	West Somerset 005C	70.85	1,087
E01029327	West Somerset 004A	64.05	1,607
E01029337	West Somerset 004C	56.51	2,395
E01029335	West Somerset 004B	54.77	2,617
E01029336	West Somerset 002D	54.1	2,707

(Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk/corporate/.
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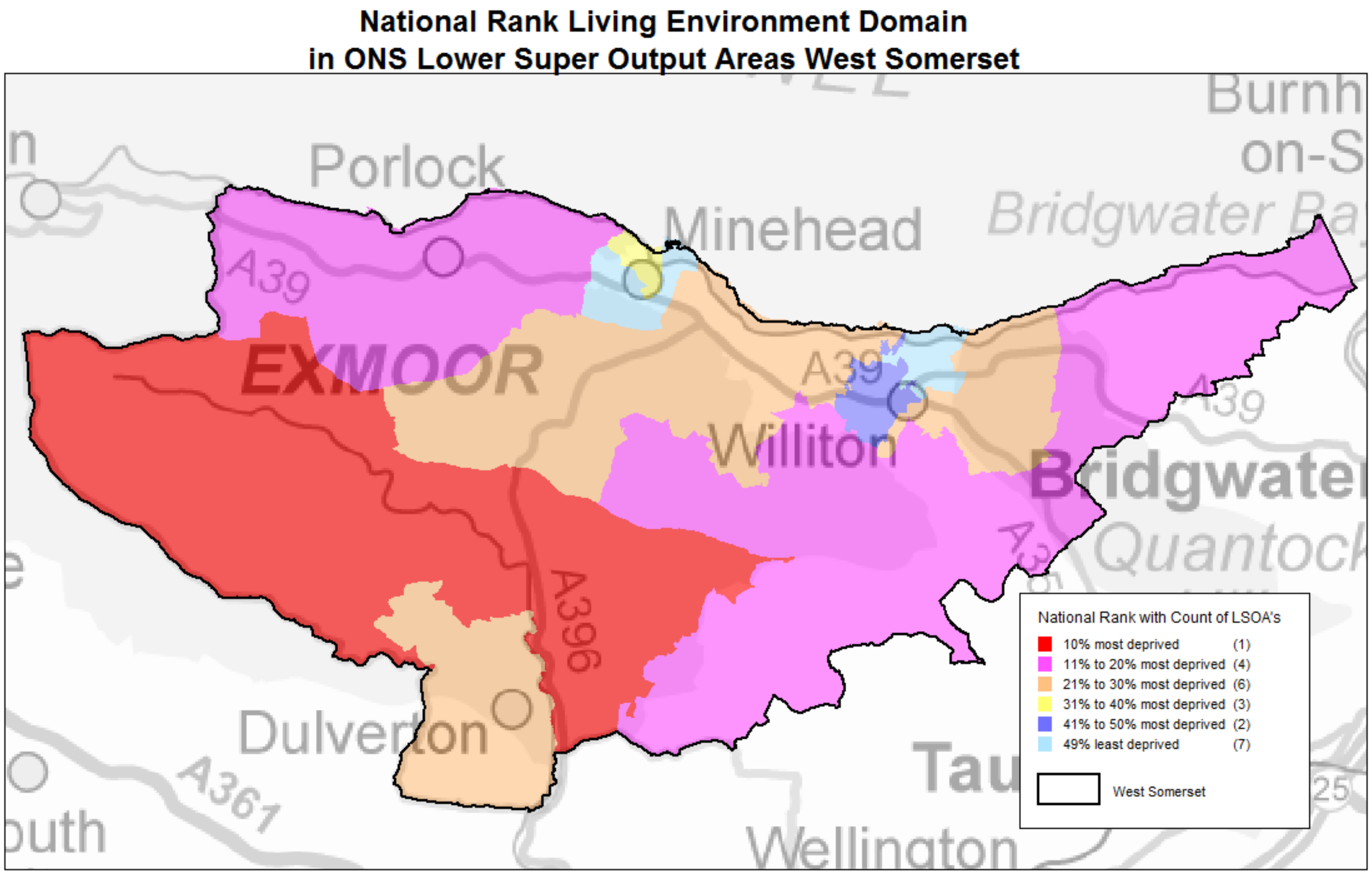
2.24 The following maps identify small areas which are in the 10% most deprived nationally for the Living Environment Domain and the Indoors Living Environment Sub Domain.

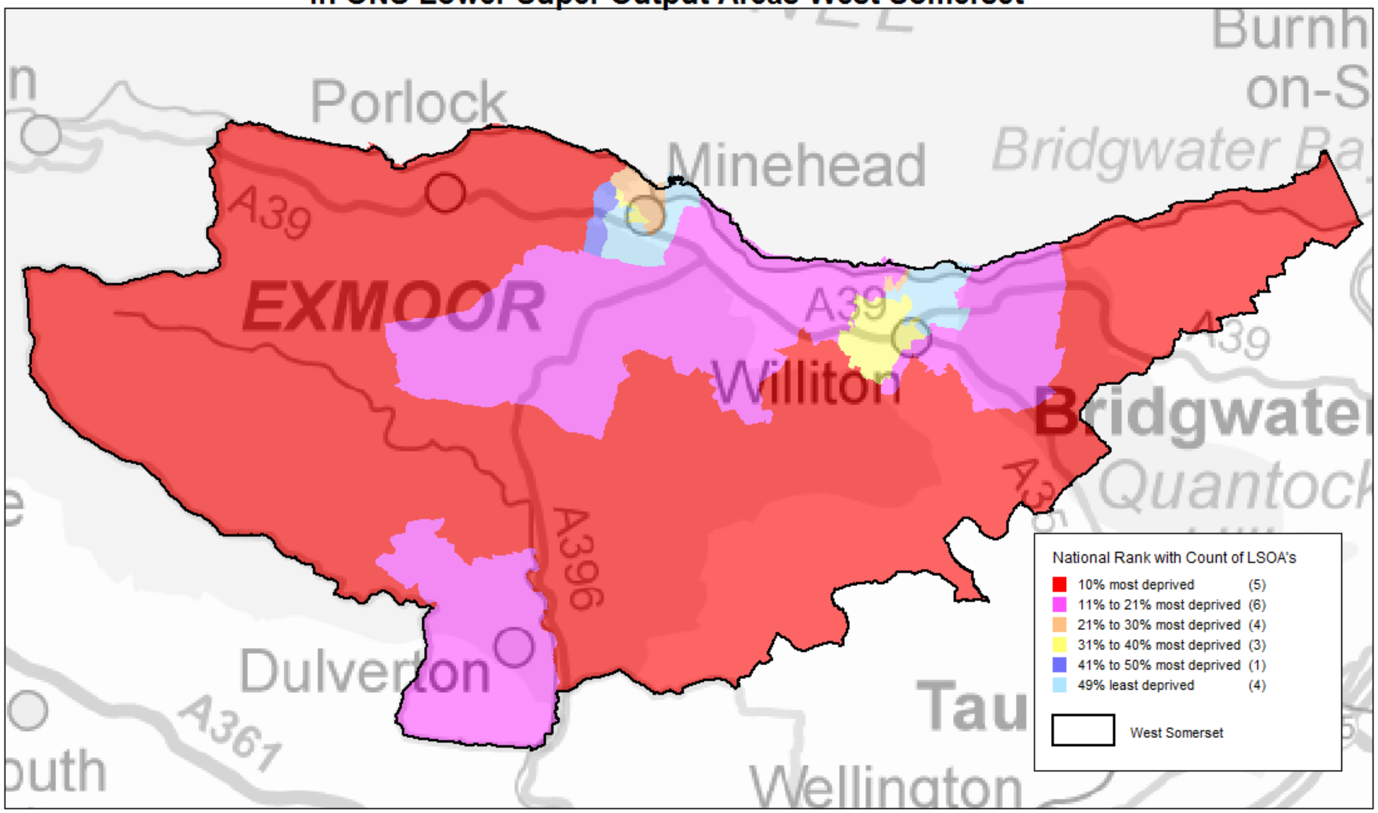
Map 2.4



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Map 2.5

National Rank Indoors Living Sub Domain in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Key findings:

- West Somerset had one small area in the 10% most relatively deprived nationally for the Living Environment domain. This was geographically quite a large area therefore likely to be mainly rural.

- There were another four small areas with relatively high deprivation being in the 21% to 30% most nationally deprived.

- There were only 7 small areas in the 49% least deprived for the Living Environment Domain, therefore there was some degree of relative deprivation for this domain in many parts of West Somerset.

- There were 5 small pockets of very high relative deprivation being in the 10% most deprived nationally for the Indoors Living Sub Domain indicating either sub standard housing conditions or lack of central heating or both.

- There were a further 6 small areas in the 11% to 20% most deprived; these being in the top quintile for national deprivation, therefore also showing relatively high deprivation for the Indoors Living Sub Domain.

- There were only 4 small areas in the 49% least deprived for the Indoors Living Sub Domain, therefore it seems that the majority of small areas in West Somerset has either poor relative housing condition or higher levels of lack of central heating compared to other small areas in England, or both according to this dataset.

2.25 The Housing and Services Domain is made up of two sub Domains:

- Sub-Domain: Wider Barriers

    - Household overcrowding: the proportion of all households in an LSOA which are judged to have insufficient space to meet the household's needs.
    - Homelessness: the rate of acceptances for housing assistance under the homelessness provisions of housing legislation.
    - Housing affordability: the difficulty of access to owner-occupation, expressed as a proportion of households aged under 35 whose income means that they are unable to afford to enter owner occupation.

- Sub-Domain: Geographical Barriers

    - Road distance to a GP surgery: A measure of the mean distance to the closest GP surgery for people living in the LSOA.
    - Road distance to a food shop: A measure of the mean distance to the closest supermarket or general store for people living in the LSOA.

- Road distance to a primary school: A measure of the mean distance to the closest primary school for people living in the LSOA.
- Road distance to a Post Office: A measure of the mean distance to the closest post office or sub post office for people living in the LSOA.

2.26 The following tables show areas in West Somerset within the 10% most deprived nationally for the Barriers to Housing and Services Domain and its sub domains.

Table 2.13: Small Areas in West Somerset in the 10% most nationally deprived for Barriers to Housing and Services Domain 2010

ONS Lower Super Output Area	Local Authority	Score	Rank
E01029338	West Somerset 005C	67.52	3
E01029327	West Somerset 004A	67.36	4
E01029335	West Somerset 004B	65.1	6
E01029326	West Somerset 003A	54.23	95
E01029337	West Somerset 004C	53.53	111
E01029328	West Somerset 005B	49.21	444
E01029333	West Somerset 002C	48.55	540
E01029336	West Somerset 002D	47.91	625
E01029342	West Somerset 004D	47.66	662
E01029340	West Somerset 003D	45.98	945
E01029334	West Somerset 003B	45.96	950
E01029322	West Somerset 002A	43.56	1425
E01029339	West Somerset 003C	39.4	2471

(Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk/corporate/.
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Table 2.14: Small Areas in West Somerset in the 10% most nationally deprived for Wider Barriers Sub Domain 2010

ONS Lower Super Output Area	Local Authority	Score	Rank
E01029329	West Somerset 001C	52.72	2900
E01029322	West Somerset 002A	52.1	2992
E01029330	West Somerset 001D	50.88	3177

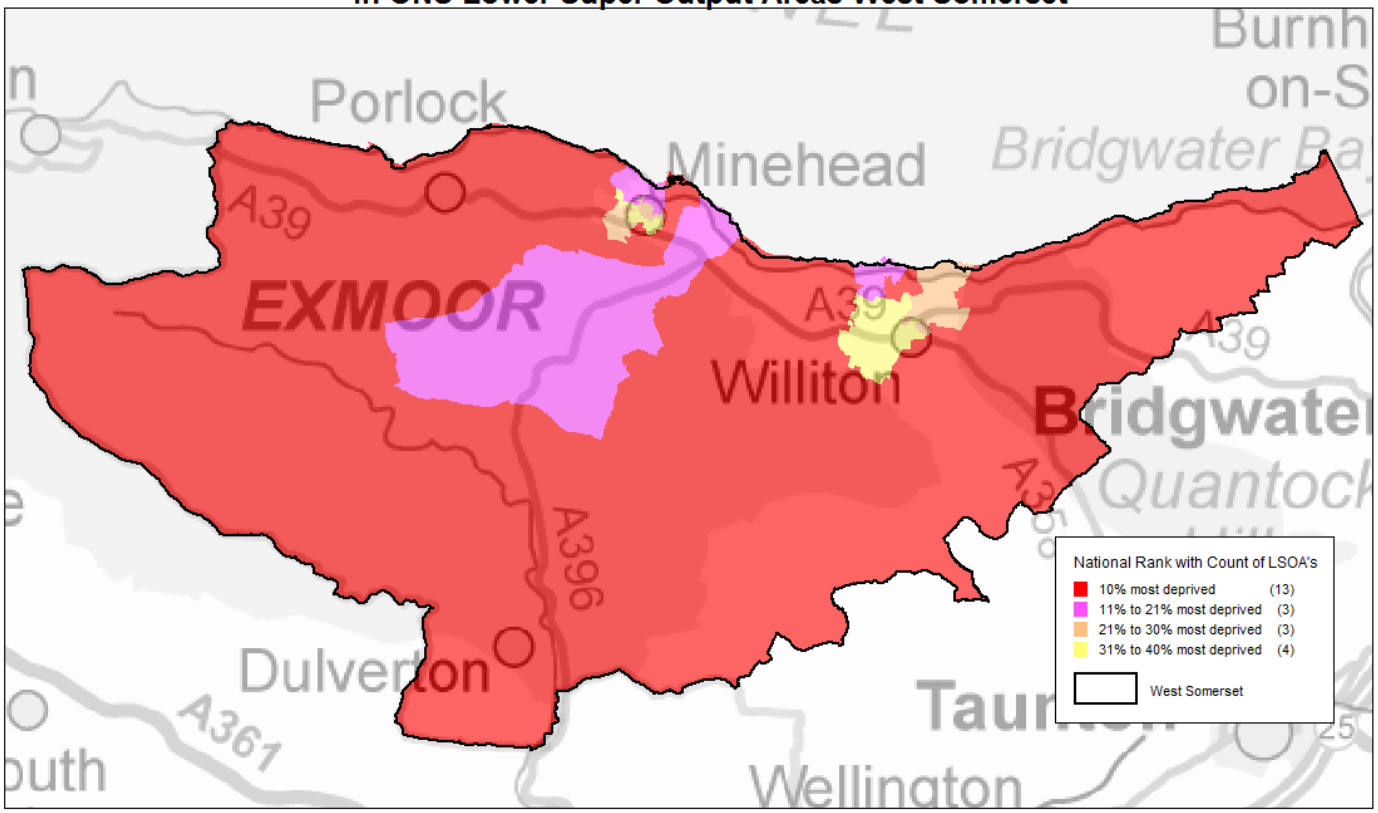
Table 2.15: Small Areas in West Somerset in the 10% most nationally deprived for Geographical Barriers Sub Domain 2010

ONS Lower Super Output Area	Local Authority	Score	Rank
E01029338	West Somerset 005C	98.64	27
E01029327	West Somerset 004A	96.18	78
E01029335	West Somerset 004B	92.47	166
E01029326	West Somerset 003A	69.67	1167
E01029337	West Somerset 004C	68.51	1249
E01029328	West Somerset 005B	57.76	2246
E01029342	West Somerset 004D	56.94	2343
E01029336	West Somerset 002D	55.68	2499
E01029340	West Somerset 003D	53.12	2843
E01029333	West Somerset 002C	51	3159

2.27 The following maps identify where there is relative deprivation for the overall Barriers to Housing and Services Domain and for the wider Barriers and geographical Barriers Sub-Domains.

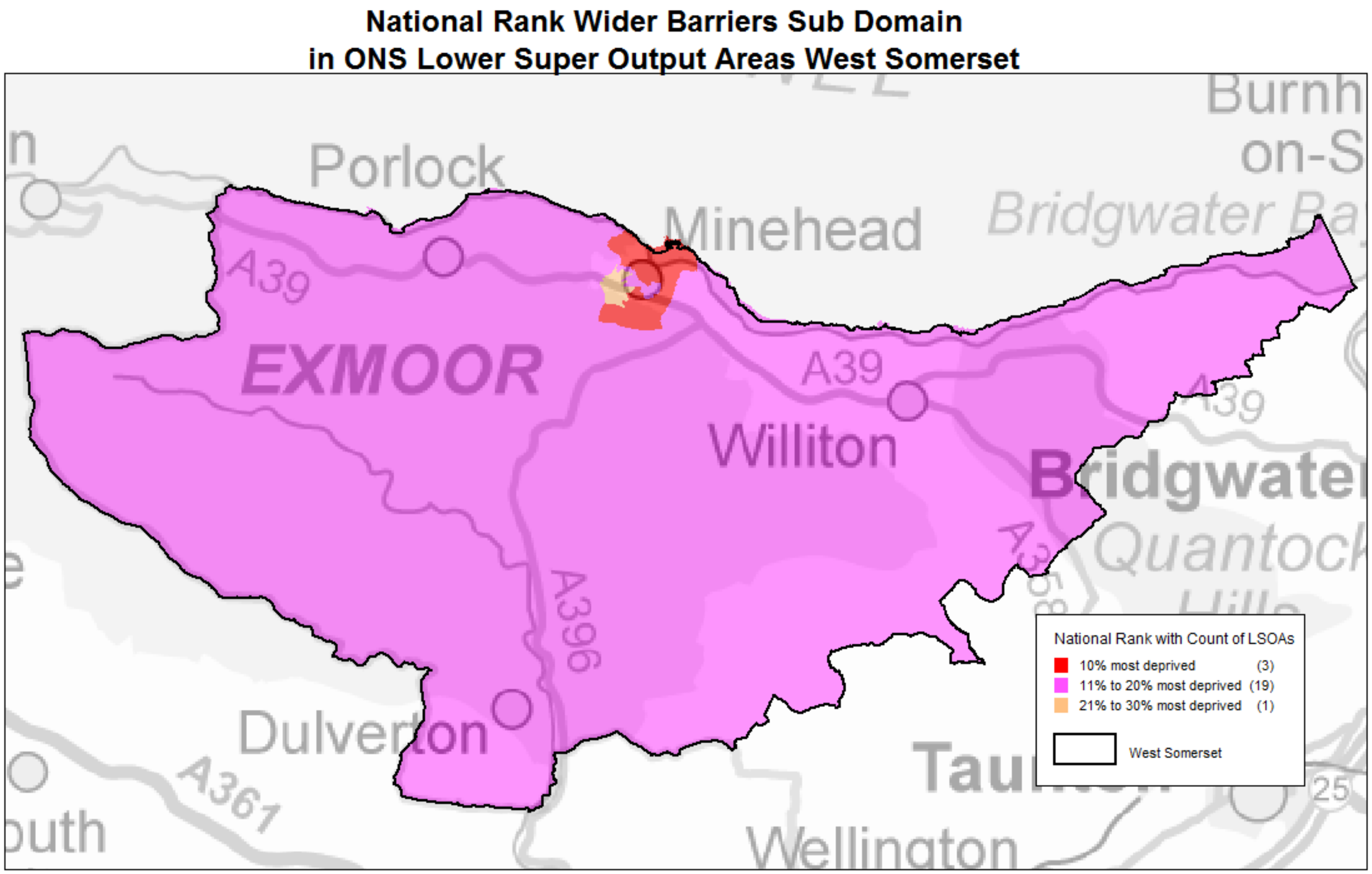
Map 2.6

National Rank Barriers to Housing and Services Domain in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

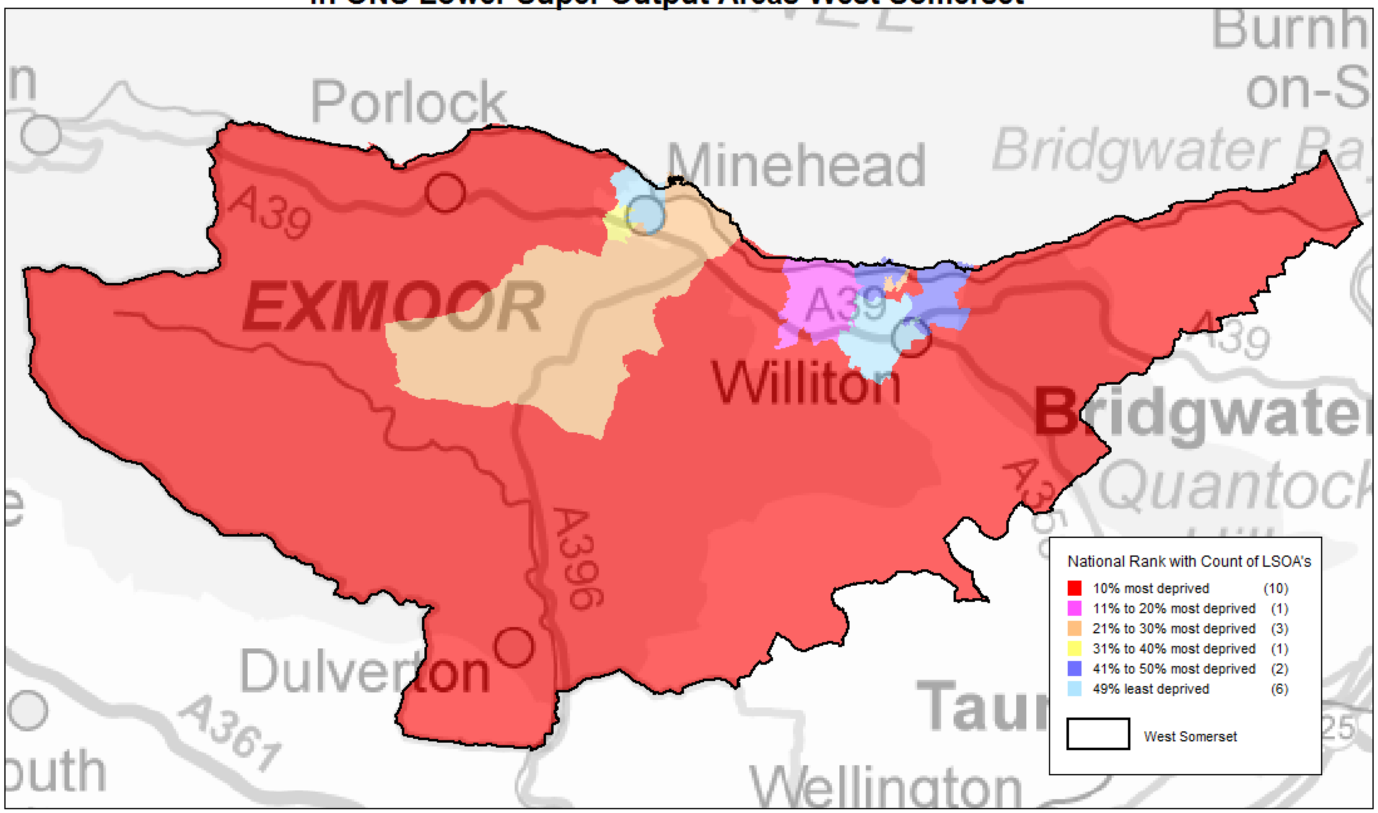
Map 2.7



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Map 2.8

National Rank Geographical Barriers Sub Domain in ONS Lower Super Output Areas West Somerset



Source: English Indices of Deprivation 2010, CLG website, http://www.communities.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Office for National Statistics Lower Super Output Area Boundaries. Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012.

Key findings:

- There were 13 small areas in West Somerset with very high relative deprivation being in the 10% most nationally deprived for the Barriers to Housing and Services Domain.

- There were a further 3 areas that were relatively highly deprived being in the 11% to 20% most nationally deprived.

- There were no areas in the 49% least deprived therefore all areas in West Somerset showed some relative deprivation for the Housing and Barriers to Services Domain.

- There were 3 small areas with very high relative deprivation being in the 10% most nationally deprived for the Wider Barriers Sub Domain. This sub domain contains housing indicators relating to overcrowding, homelessness and affordability in terms of access to owner occupation. These 3 areas were based in or around Minehead, therefore most likely to be urban areas.

- There were a further 19 areas showing relatively high deprivation being in the 11% to 20% most deprived nationally for the Wider Barriers Sub Domain.

- There were no areas in the 49% least deprived for the Wider Barriers Sub Domain, therefore all areas in West Somerset showed some relative deprivation for the Wider Barriers Sub Domain.

- There were 10 small areas with very high relative deprivation for the Geographical Barriers Sub Domain being in the 10% most nationally deprived.

- There were 6 small areas in the 49% least deprived for the Geographical Barriers Sub Domain therefore the majority of small areas in West Somerset showed some relative deprivation for this sub domain. These areas were small therefore likely to be more urban and have more access to services.

2.28 Pulling together data and information that has been collated on deprivation, it is possible to draw the following conclusions:

- West Somerset is in the 14% most deprived local authorities for Rank of Average Rank and the 28% most deprived for Rank of Average Score, therefore there is some degree of relative deprivation within small areas in the local authority.

- The combined Index of Multiple Deprivation does not show many pockets of very high relative deprivation there being none in the top 10% nationally and only one in the top quintile. The majority of small areas (all but one) were in the 50% most deprived nationally therefore there is some degree of relative multiple deprivation in most small areas of West Somerset.

- The Income Domain does not show many pockets of very high relative deprivation, there being no small areas in the 10% most nationally deprived and only one small area in the top quintile. There were 9 small areas falling in the least deprived half of the country in terms of national ranking therefore showing that there are some small areas in West Somerset with relatively low income deprivation. This would suggest there are some small areas where there are not a high number of benefits claimants. 14 small areas fell in the most deprived 50% in terms of national ranking, therefore there would be some degree of benefit dependency within these areas.

- The Index of Deprivation Affecting Older People Index showed no pockets of very high relative deprivation. Nearly three quarters (17 areas) were in the least deprived half of the country in terms of national ranking therefore these areas of West Somerset are not likely to have a high degree of older persons who are benefit dependent. There were only 6 areas falling with the most deprived half of the country in terms of national ranking and these areas are more likely to have a higher level of benefit dependency among older persons. These areas appear to be smaller and are therefore likely to be more urban in nature.

- The Indoors Living Sub Domain (for the Living Environment domain) indicates that there are 11 small areas in the top quintile for relative national deprivation, therefore having a high or very high level of either sub standard housing or lack of central heating. There were only 4 small areas that fell in the least deprived half of the country for this Sub Domain, therefore, it shows the majority of small areas to have relative deprivation for this sub domain. It should be borne in mind that central heating data was from the 2001 Census and that the stock condition data is based on 2005 data and that conditions may have changed since this time.

- The majority of small areas (22) were in the top quintile for the national rank of deprivation for the Wider Barriers sub domain and none were in the half of the country that were least deprived. This sub domain contains housing indicators for overcrowding, homelessness and access to owner occupation for under 35s. The overcrowding data is based on 2001 Census data, the homelessness data is from 2008 to 2009 and the affordability data is based on modelled 2008 data with each LSOA being given the same local authority estimate.

- Small areas with higher deprivation consist of:
    - E01029344, a small area just above Williton has high multiple deprivation but not for indoors living which is one of the main housing indicators;
    - E01029338, a very large rural area in the Exmoor National Park, has the highest deprivation for Indoors Living; has quite high deprivation for Wider Barriers and has very high deprivation for geographical barriers i.e. access to amenities; and
    - E01029329, a small urban area in Minehead, has the highest deprivation rank for Wider Barriers; it has fairly high Indoors Living Deprivation (in the top 30%) and fairly high employment deprivation (also in the top 30%).

Population and household changes and projections

2.29 This section presents data for either the West Somerset Council or the Local Planning Authority area. ONS provide data enabling an analysis of the Components of Population Change but this is only available at District Council level. Consequently, data identifying population change/projection has only been presented at this level. However, household projections data has been presented at the LPA area level as this informs housing projections.

Projected population by age

2.30 This section uses ONS 2010-based population projections to identify trends from 2011-2035. These estimates are released by ONS every 2 years and reflect in changes to the birth and death rates and to net migration. These inform household projections which are the key factor influencing the future requirement for housing. However, it should be noted that the release of 2011 Census estimates has called the accuracy of these projections into question. 2010-based population projections estimated a total population of 35,900 in West Somerset compared with a Census estimate of 34,675. Consequently the projections presented below should be considered a slight overestimate. 2011-based population projections have since been released and but these only cover the 10 year period 2011-2021. The potential effect of these new projections can be seen in a subsequent comparative table. Population projections data has been expressed as both a table and bar chart which identifies the change in the area's and each districts population by age. They clearly demonstrate the real and proportionate increase in the oldest age groups.

Table 2.16: projected change in the population of the West Somerset Council area by age band, 2011-2035, 000s

Age Band	2011	2016	2021	2026	2031	2035	Population Change	% Change 2011 to 2035
0-14	4.6	4.6	4.8	4.9	4.7	4.6	0.0	0.0
15-24	3.8	3.5	3.3	3.3	3.6	3.7	-0.1	-2.6
25-34	2.4	2.7	2.7	2.5	2.5	2.5	0.1	4.2
35-44	3.3	2.7	2.8	3.1	3.1	2.9	-0.4	-12.1
45-54	4.9	4.9	4.2	3.6	3.7	3.9	-1.0	-20.4
55-64	5.9	5.6	6.0	6.1	5.5	4.9	-1.0	-16.9
65-74	5.5	6.3	6.3	6.1	6.8	7.0	1.5	27.3
75-84	3.6	3.9	4.5	5.3	5.4	5.3	1.7	47.2
85+	1.8	2.1	2.4	2.9	3.5	4.3	2.5	138.9
All ages	35.9	36.3	37.0	37.9	38.8	39.4	3.5	9.7

(Source: Sub-National Population Projections ONS 2010, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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Key findings:

- The population in West Somerset is projected to increase by 3,500 (almost 10%) between 2011 and 2035.

- The age profile of the population is expected to change in West Somerset;

  - No growth is projected in those aged under 15;

  - Limited growth is projected in those aged 25-34;

  - Slight decline is projected in those aged 15-24, and for those age bands between 35 and 64;

  - A higher level of growth is projected in all those of pensionable age with those aged between 65 and 74 increasing by 27%, those aged between 75 and 84 increasing by 47.2% and those aged 85+ by 138.9% (+2,500). This latter group has the greatest need for housing with care.

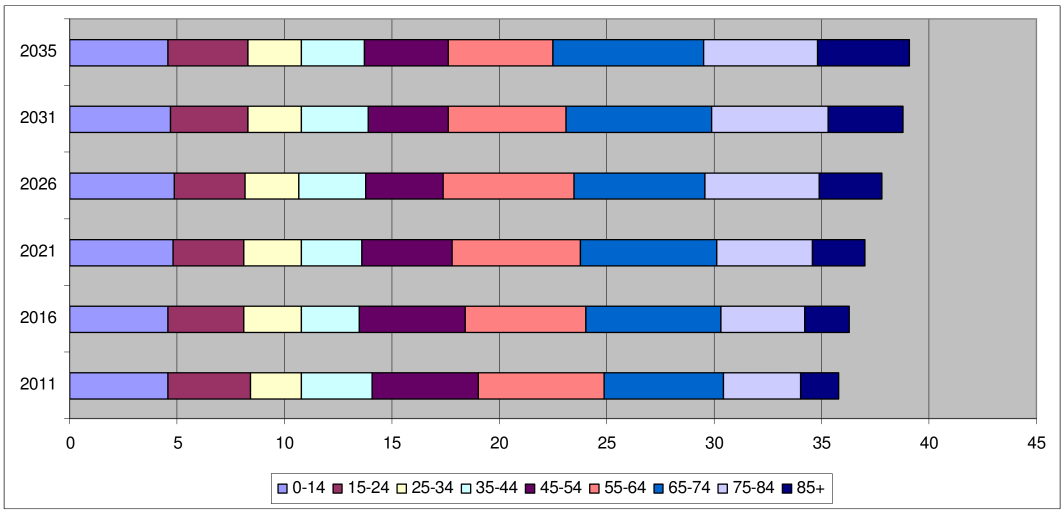
  - The high projected growth in the older population will result in:

    - a proportionately higher level of the under-occupation of family housing unless options to downsize are available; and

- a proportionately greater requirement for housing which meets the requirements of older households, including housing with care.

2.31 The following chart demonstrates graphically the changing age profile of the District Council area's population between 2011 and 2035 as detailed above.

Fig 2.2: the effect of change in the population of the West Somerset Council area by age band, 2011-2035, (000's)



(Source: Sub-National Population Projections ONS 2010, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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2.32 As mentioned above, 2011-based population projections have been released for the 10 year period to 2021 and the following table compares 2010 and 2011-based projections.

Table 2.17: projected change in the population of the West Somerset Council area by age band, 2011-2021, 000s

Age band	*2011*			*2016*			*2021*		
	2010	*2011*	*Effect*	*2010*	*2011*	*Effect*	*2010*	*2011*	*Effect*
0-14	4.6	4.5	-0.1	4.6	4.7	0.1	4.8	5	0.2
15-24	3.8	3.5	0.3	3.5	3.5	-	3.3	3.3	-
25-34	2.4	2.8	0.4	2.7	2.8	0.1	2.7	2.8	0.1
35-44	3.3	3.3	-	2.7	3.0	0.3	2.8	3.0	0.2
45-54	4.9	4.8	-0.1	4.9	4.7	-0.2	4.2	4.2	-
55-64	5.9	5.6	0.3	5.6	5.5	0.1	6.0	5.9	-0.1
65-74	5.5	5.2	0.3	6.3	6.1	-0.2	6.3	6.2	-0.1
75-84	3.6	3.4	-0.2	3.9	3.7	-0.2	4.5	4.4	-0.1
85+	1.8	1.5	-0.3	2.1	1.9	-0.2	2.4	2.3	-0.1
Totals	35.8	34.6	0.6	36.3	35.9	-0.2	37.0	37.1	0.1

(Source: Sub-National Population Projections ONS 2010, and 2011 Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.

Key findings:

- Comparing the 2010 and 2011-based projections, there are only minor differences, the net effect of which for the period 2016-2021 is a decline of 100 people.

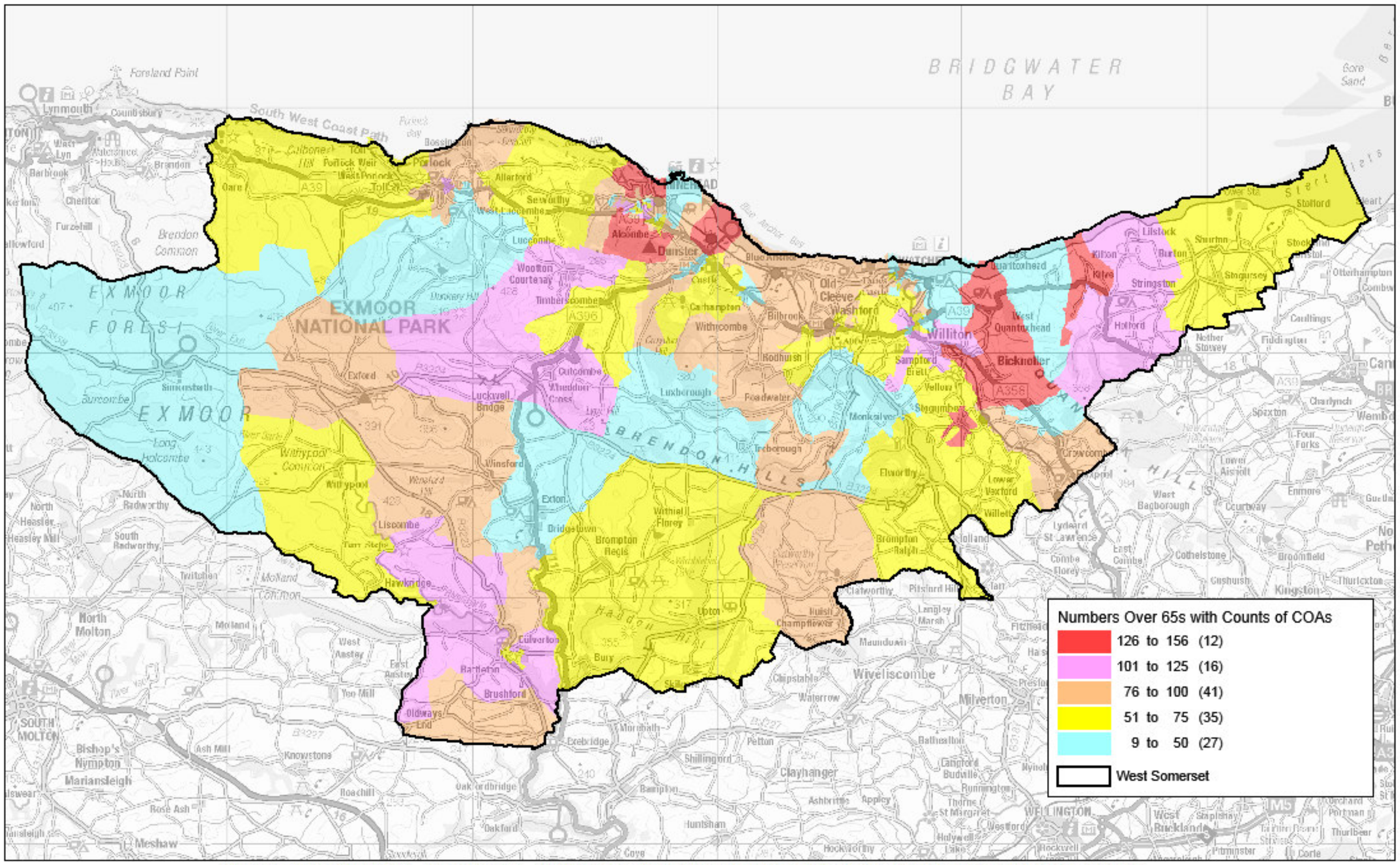
- However, there are differences in the distribution of population growth or decline with an increase of 1,000 in those aged under 45 and a decline of 900 in those aged 65+. In terms of housing requirements, the implication is of a slight increase in demand for family housing and decrease in demand for smaller housing for older people.

2.33 A district-wide profile of population projections by age is unable to identify the extent to which change is likely to affect different locations. This is especially the case for the growth in the older population where there is the risk that the future elderly may be living in smaller and more remote settlements isolated from facilities and services. The following maps identify the number of people aged 65+ in Census Output Areas across the district then those aged 45-64 (the 'approaching elderly') group. They clearly demonstrate that:

- whilst there are currently concentrations of older people around Williton and Minehead, this also the case in the Exmoor National Park and around Dulverton; and

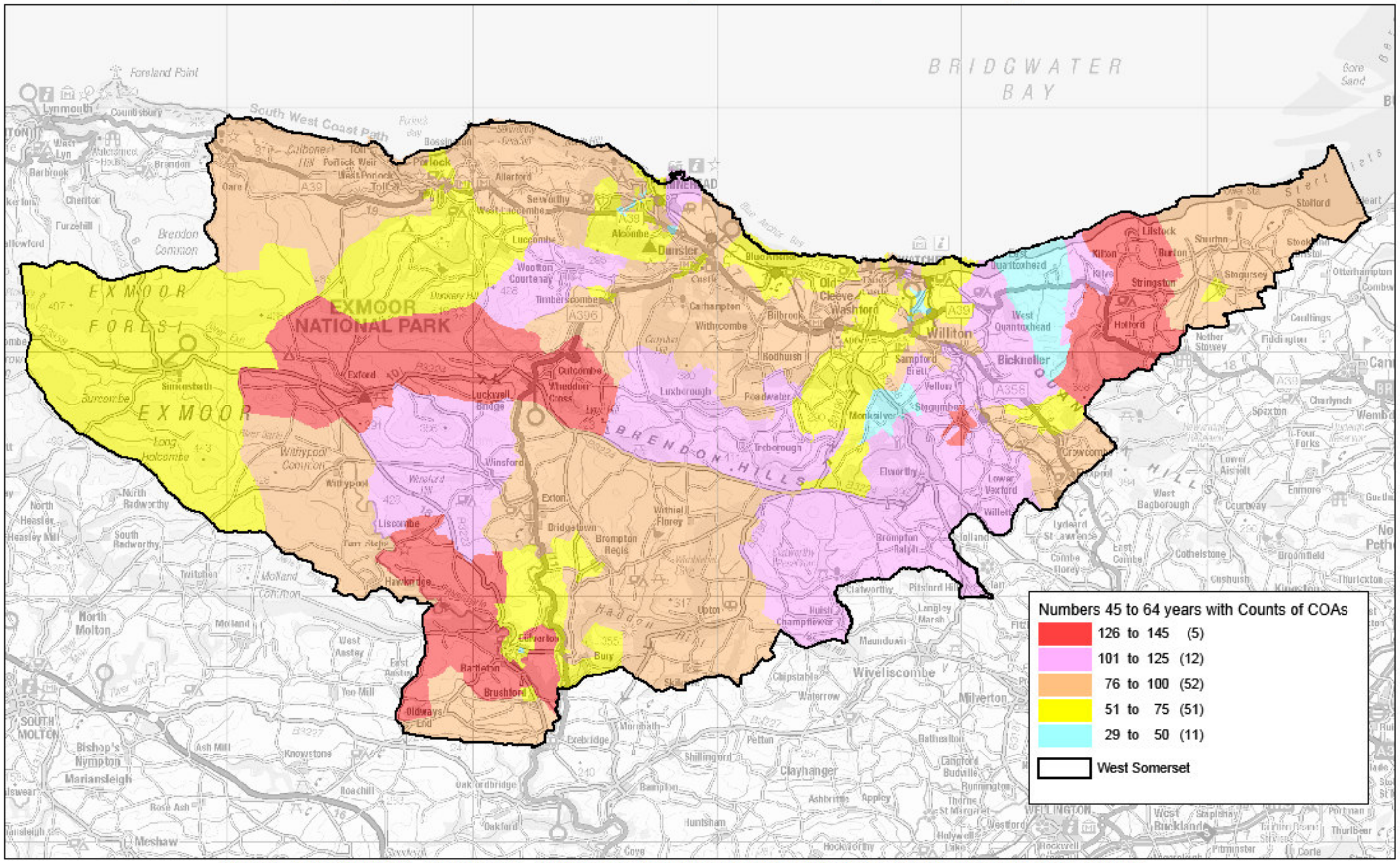
- for the ‘approaching elderly’, there are increased concentrations in deeper rural locations, and which is of concern in relation to social care and support and the sustainability of communities.

Numbers of Over 65s in small areas (Census Output Areas) in West Somerset



Source: Table KS102EW, Age Structure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website, http://www.neighbourhood.statistics.gov.uk/dissemination/. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013.

Numbers of 45 to 64 year olds in small areas (Census Output Areas) in West Somerset



Source: Table KS102EW, Age Structure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website, http://www.neighbourhood.statistics.gov.uk/dissemination/. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains National Statistics and Ordnance Survey Data (c) Crown Copyright and Database Right 2013.

Understanding components of population change

2.34 Population projections form the basis of household projections which, in turn, inform the requirement for housing. The following tables summarise components of population change for the period 2011-2031, in particular, the extent to which population change is driven by natural change, internal or international migration.

Table 2.18: 2010-based components of population change for West Somerset, 2011-2031, (000's)

	2011	2012-2016	2017-2021	2022-2026	2027-2031	Total 2012-2031
Natural Change	**-0.20**	**-1.00**	**-1.00**	**-1.00**	**-1.10**	**-4.1**
Births	0.30	1.50	1.50	1.50	1.50	6.0
Deaths	0.50	2.50	2.50	2.50	2.50	10.0
All Migration Net	**0.20**	**1.30**	**1.50**	**2.00**	**2.00**	**6.8**
Internal Migration In	2.10	10.50	10.50	11.00	11.20	43.2
Internal Migration Out	1.90	9.50	9.30	9.00	9.20	37.0
International Migration In	0.20	1.00	1.00	1.00	1.00	4.0
International Migration Out	0.10	1.00	1.00	1.00	1.00	4.0
Cross Border Migration In	0.10	0.50	0.50	0.50	0.50	2.0
Cross Border Migration Out	0.10	0.50	0.50	0.50	0.50	2.0

(Source: components of population change, 2010-based Sub-National population projections ONS, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- Internal migration is the most significant single component of projected population change for West Somerset identifying a net increase of 6,800 people in the period 2012-2031. This contrasts with a net loss due to Natural Change of 4,100 people.

Household projections

2.35 This section uses CLG 2008-based household projections to identify trends for the West Somerset LPA area from 2011-2031. As the projected total of households in the West Somerset Council area at 2011 (16,538) is substantially above the 2011 Census estimate (15,623), projections have been recalibrated to the lower base level. This has had the effect of reducing the 2008-based projections by 5.53%. The projections have been further recalibrated to 72.33% of the West Somerset Council total to generate projections for the smaller Local Planning Authority area.

Methodology

2.36 The following extracts explain the methodology underpinning household projections.

"Household projections are based on the population projections produced by the Office for National Statistics (ONS). The number of people living in private households is estimated by taking the population projections for each year and subtracting the number of people living in communal establishments, such as student halls of residence, care homes or prisons.

Household representative rates are projected using logistics time series trends from Census data, by age, marital status and gender. Household representative rates combined with the private household population provides the basic household projections.

To estimate the number of households of each type, information on household type and age group is projected forward from the 1991 and 2001 Censuses, for each household type, age group and local authority area. This is constrained to the total number of households.

Because the overall projections for England are believed to be more accurate than those for individual local authorities, the local authority figures are constrained to the England total".[2].

Population projections

2.37 The first main input into the household projections is population projections for England produced by the ONS. These are produced for England by local authority, sex and single year of age, using assumptions about births, deaths and migration. The relevant population for household formation is taken to be the adult population, aged 16 or over.

2.38 The current methodology for producing the household projections has remained largely unchanged since the 1996 based household projections released in October 1999.

2.39 In the current method, projected household representative rates are applied to a projection of the private household population disaggregated by age, sex and marital/cohabitational status and summing the resulting projections of household representatives. The key data sources and methodological stages are:

[2] Technical Report, Households Across the United Kingdom, 30/8/2011, Published by Statistical Directorate Welsh Government January 2011 and Updated August 2011, page 3

- Population projections are taken from the latest release by the Office for National Statistics (ONS) at the national and subnational level.

- Marital status projections (de jure and de facto) at the national level are taken from the latest ONS release. Projections at subnational levels are assumed to follow the national pattern.

- The institutional population is deducted from the total population to give the private household population. The institutional population is assumed to stay at a constant level for younger age groups and at a constant share of the population for older age groups (as given in the 2001 Census).

- Household representative rates are extrapolated from Census data (1971, 1981, 1991, 2001), disaggregated by age, sex and marital status. Labour Force Survey (LFS) data are used to inform inter-Censual interpolations, post-Census estimates and future trends of household representative rates. The LFS and Census data are weighted together with the LFS data being given a lower weight than the Census.

- The resultant household representative rates are applied to the projected private household population and summed across the age/sex/marital status groups to give total household numbers.

- Projections are initially undertaken independently at the national, regional and sub-regional levels with regional projections then being constrained to the national projections and sub-regional projections being constrained to regional projections' [3].

2.40 A detailed description of the current methodology and data sources used is available at

http://www.communities.gov.uk/housing/housingresearch/housingstatistics/housingstatisticsby/householdestimates

2.41 Resulting household projections data can be broken down into different household types as follows:

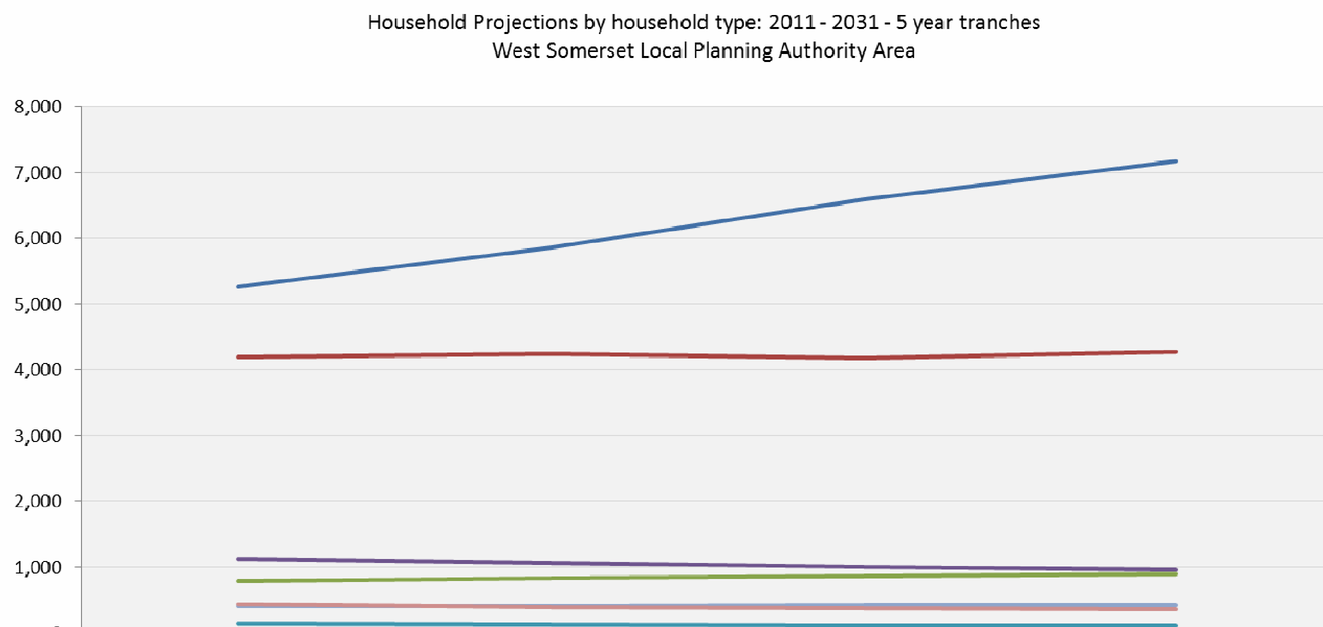
- One person household
- Couple: no dependent children
- A couple and one or more other adults: no dependent children
- Couple + dependent child(ren)

[3] Consultation on Proposed Changes to the National Statistics on Household Projections, CLG 2010, page 6

- Lone parent + dependent child(ren)
- Couple + adult(s) +dependent child(ren)
- Lone parent + adult(s) +dependent child(ren)
- Other households: a multi person household that is neither a couple household nor a lone parent household. Examples include, lone parents with only non-dependent children, brothers and sisters and unrelated (and non-cohabiting) adults sharing a house or flat. This category does not include households with dependent children

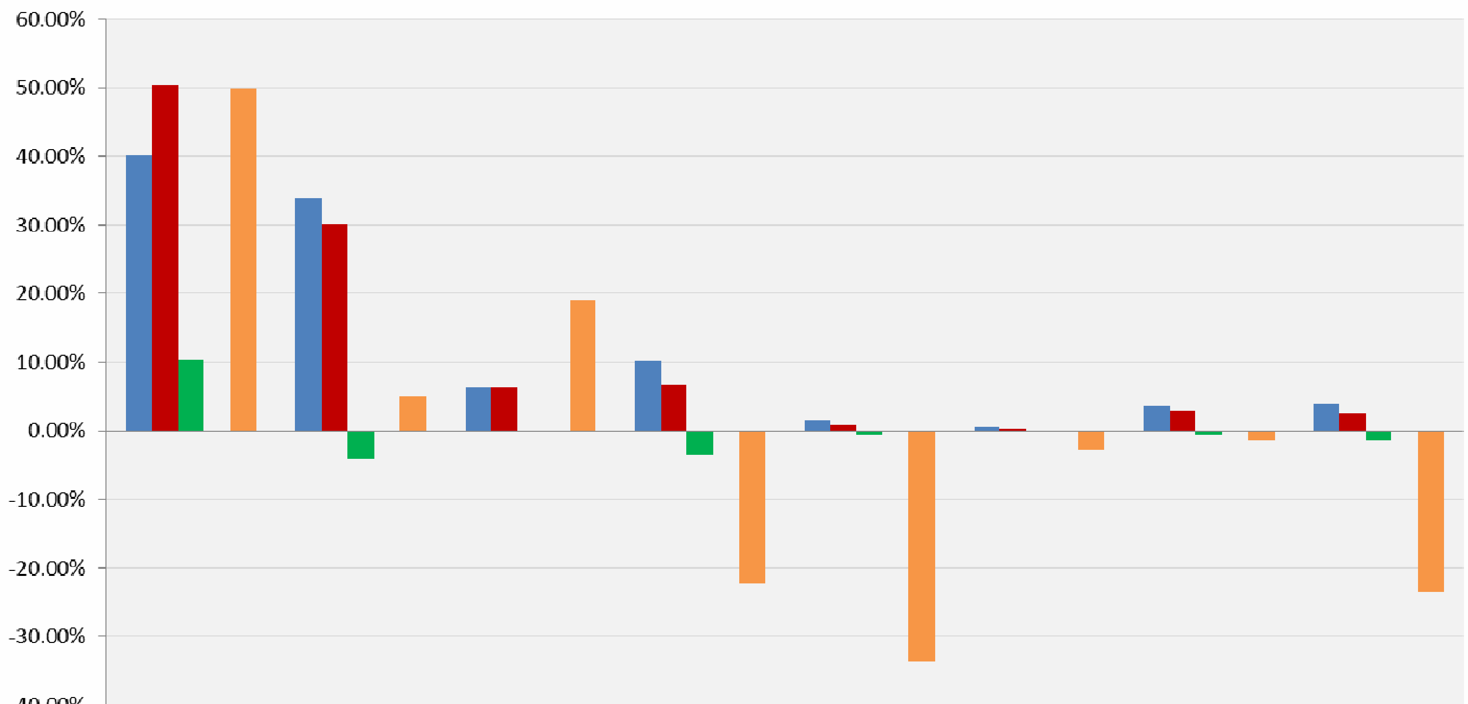
2.42 The following tables and charts present the projections for the West Somerset LPA area between 2011 and 2031. They identify the dramatic growth in single person households and reduction in family households with the exception of lone parent families. The detailed findings are as follows:

- One person: growth of almost 50%
- Couple no children: 5% growth
- Couple/lone parent and 1 child: 19% growth
- Couple/lone parent and 2 children/couple and 1 or more adults no children: 22% decline
- Couple/lone parent and 1 or more adults and 1 child: 34% decline
- Couple/lone parent and 3+ children/ couple/lone parent and 1 or more adults and 2 children: 3% decline
- Couple/lone parent and 1 or more adults 3+ children: 24% decline



	2011-16	2016-21	2021-26	2026-31
One person	5,269	5,865	6,590	7,181
Couple (CPL) no children	4,200	4,235	4,188	4,273
Couple/Lone Parent (LP) 1 child	785	829	869	894
CPL/LP 2child'n-CPL 1+adult no child	1,131	1,068	1,000	955
CPL/LP 1+ adults 1 child	145	129	122	114
Lone parent/+ 1 or more adults 2 children	51	50	50	50
CPL/LP 1+ adults 3+ children	403	412	425	425
Other households	435	399	370	357

Household Projections by household type: 2012 - 2031 - percentages
West Somerset Local Planning Authority Area



	One person	Couple (CPL) no children	Couple/Lone Parent (LP) 1 child	CPL/LP 2child'n-CPL 1+adult no child	CPL/LP 1+ adults 1 child	Lone parent/+ 1 or more adults 2 children	CPL/LP 1+ adults 3+ children	Other households
% of total 2011	40.06%	34.01%	6.28%	10.27%	1.44%	0.43%	3.61%	3.90%
% of total 2031	50.39%	29.99%	6.27%	6.71%	0.80%	0.35%	2.98%	2.50%
% change 2011 to 2031	10.33%	-4.02%	-0.01%	-3.57%	-0.64%	-0.08%	-0.63%	-1.40%
Change in total	49.86%	5.05%	18.96%	-22.25%	-33.61%	-2.82%	-1.51%	-23.57%

International migration

2.43 A potentially important component of population change is international immigration for employment. The registration of UK non-nationals for National Insurance (NINO) provides an invaluable source of data. Data identifies the local authority in which people first registered and they may have gone on to work anywhere in the country. Numbers are only recorded for ten or more migrant workers and therefore, the recorded total may be more than the sum of the entries. The following table summarises the extent of migration for the ten years since 2002.

Table 2.19: National Insurance Registration by Non-UK Nationals, 2002-2011, 000s

Year	West Somerset	South West	England
2002/03	0.03	15.42	309.97
2003/04	0.04	16.07	331.98
2004/05	0.06	22.57	388.03
2005/06	0.25	34.06	579.52
2006/07	0.18	41.23	607.95
2007/08	0.27	38.90	636.88
2008/09	0.27	33.11	607.88
2009/10	0.15	23.67	515.12
2010/2011	0.18	30.88	636.45
Total	1.43	256	4,614
Change	0.15	15	326
% Change	500.0	100.3	105.3

(Source: National Insurance Recording and Pay as You Earn System, Summary Tables, DWP website, http://www.dwp.gov.uk/.
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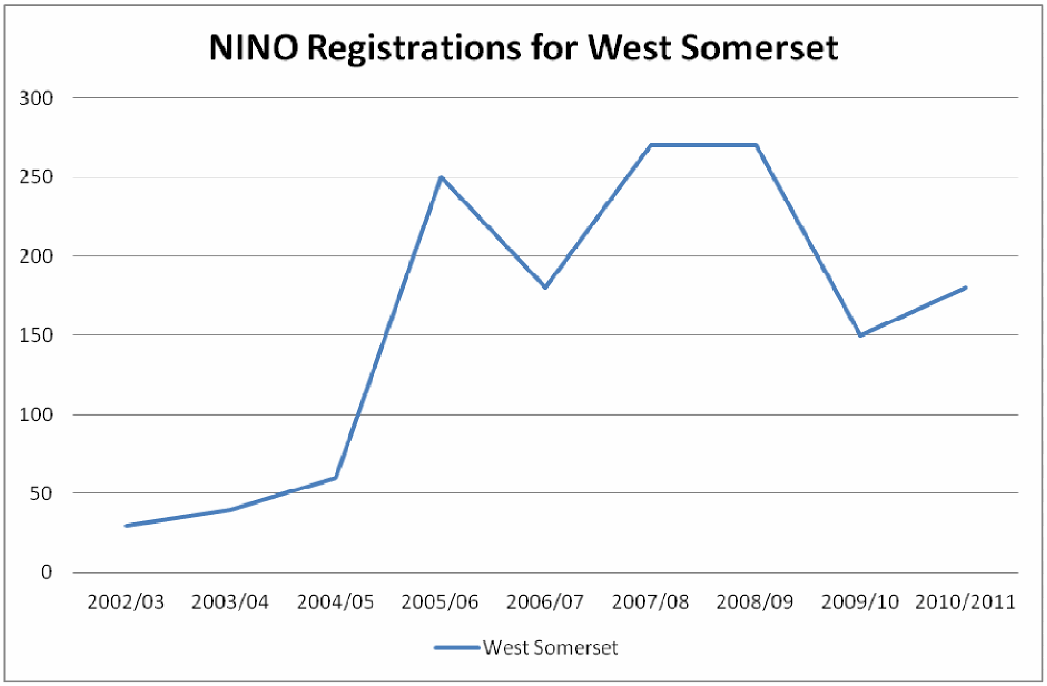
Key findings:

- In relative terms, and comparing 2002/03 with 2010/11, registrations increased by five times during the period. This was a much higher percentage increase than in the South West and England where registrations had doubled during the period.
- The total number of registrations was low in West Somerset during the period from 2002 to 2011 at 1,430
- Registrations peaked in between 2007 and 2009 before a decline in new registrations which may well reflect a fall from the surge in migration following the 2004 EU accession and the worsening economy; or
- It is important to note that 'returning home' is not measured so net gain may be much lower.

2.44 The following graph demonstrates the patterns of registrations more clearly.

Fig 2.3



(Source: National Insurance Recording and Pay as You Earn System, Summary Tables, DWP website, http://www.dwp.gov.uk/.Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

2.45 The following table identifies, from a total of 29 countries of origin, the main countries from which people have migrated. Total numbers for the main countries are small, the main change over time is the increase in migration from the A8 central/east European countries which acceded to the EU in 2004 including Poland, Lithuania and Slovakia and the A2 countries, Bulgaria and Romania, which joined in 2007.

Table 2.20: NINO Registrations of 50 people or more in West Somerset from 1st January 2002 to September 2011

Total	Poland	Hungary	Slovak Republic	Philippines	Czech Republic	Rep of Lithuania
1,510	570	270	80	60	50	50

(Source: DWP Tabulation Tool, DWP website, http://www.dwp.gov.uk/.
Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- Poland was the largest single source of migrants and Hungary the second largest source, but migration was most significant from A8 countries which joined the EU in 2004 and from the A2 countries in 2007.

2.46 The following table uses Census data to identify the proportion of the population born in the UK and the year of arrival for those who were not born in the UK.

Table 2.21: year of arrival in the UK

Year of arrival	West Somerset			South West		England	
	No	%	Rank	No	%	No	%
Born in the UK	32,904	94.9	101	4,884,275	92.3	45,675,317	86.2
Arrived before 1941	85	0.2	8	7,168	0.1	46,539	0.1
Arrived 1941-1950	124	0.4	37	14,776	0.3	132,279	0.2
Arrived 1951-1960	181	0.5	159	26,787	0.5	346,260	0.7
Arrived 1961-1970	175	0.5	254	36,540	0.7	654,558	1.2
Arrived 1971-1980	130	0.4	285	30,145	0.6	616,453	1.2
Arrived 1981-1990	115	0.3	297	30,432	0.6	639,633	1.2
Arrived 1991-2000	149	0.4	318	53,294	1.0	1,218,499	2.3
Arrived 2001-2003	80	0.2	326	36,394	0.7	769,202	1.5
Arrived 2004-2006	228	0.7	264	67,520	1.3	1,126,327	2.1
Arrived 2007-2009	326	0.9	208	67,648	1.3	1,193,078	2.3
Arrived 2010-2011	178	0.5	184	33,956	0.6	594,311	1.1
All Categories: Year of Arrival in the UK	34,675	100.0		5,288,935	100.0	53,012,456	100.0

(Source: QS801EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk
Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/)

Key findings

- The 2011 Census table Year of Arrival in the UK shows that majority of the population of West Somerset were born in the UK (94.9%). This is higher than in the South West (92.3%) and nationally (86.2%).

- The remaining 5.1% arrived in the UK at different times with the highest percentage arriving more recently between 2004 and 2009 (1.6%). The most recent year shows arrivals of 0.5%; however, this is only a one year period and if this were to be doubled during 2011 to 2012 then this would be 1.0% and would be higher than the previous two year period where it was 0.9%, therefore arrivals may still be increasing.

- The South West and England also showed higher percentages of arrivals between 2004 and 2009 than in other periods. England had a higher percentage of arrivals between 1991 and 2000 (2.3%) than in the South West (1.0%) and West Somerset (0.4%).

2.47 The important question raised by such migration is the impact on the housing market. It is historically the case that migrants to the UK, especially the first wave of single people or those arriving without their family have, through their household composition and short residence, found difficulty in accessing social housing and home ownership has been too expensive. As a result, their initial housing requirements have been met by a combination of the ‘informal market’ of renting through family or friends and most significantly by the private rented sector. It is anticipated that migrants from EU accession countries would have followed this pattern, but further research would be required to confirm it.

Internal migration

2.48 Internal migration refers to population movement within England and can be an important factor in determining housing requirements. As identified in the 2008 SHMA, West Somerset has long experienced net in-migration and which places additional pressure on the housing market.

2.49 Trends can be monitored using estimates of internal migration prepared using a combination of three administrative data sources, the Patient Register Data Service (PRDS), the National Health Service Central Register (NHSCR) and Higher Education Statistics Agency (HESA) data. Referred to as NHSCR data, it is reliant on people registering with a GP and those groups who are recognised to register at lower rates include students, especially male students and young men. Conversely, families and older people are more likely to register. Please note that figures are rounded to the nearest 10 or 100 by ONS and therefore, totals may vary from the sum. The following tables show 10 year trend in net migration to 2010/11 for as follows.

Table 2.22: net effect of internal migration - West Somerset, years ending June 2001-11, (000’s)

2001/2002	2002/2003	2003/2004	2004/2005	2005/2006	2006/2007	2007 20/08	2008/2009	2009/2010	2010/2011	Total	Average
0.5	0.4	0.3	0.1	0.1	0.3	0.3	0.1	0.2	-0.2	2.1	0.21

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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Key findings:

- A 10 year trend identifies a net migration annual average of 210 people and that, with the exception of 2010/11, there has been consistently a net gain of population.

2.50 The remainder of this section focuses on detailed and recent patterns and trends. The following maps show internal migration in and out of West Somerset for the year ending 2011 and net migration for the three year period ending June 2011. The table below shows internal migration in and out of West Somerset for each of the three years up to June 2011 and Net Migration for the three year period ending June 2011.

Table 2.23: net migration into and out of West Somerset from/to regions for three years ending June 2011

Regions	In Migration			Out Migration			Net Migration
	2009	2010	2011	2009	2010	2011	
South East	330	330	240	200	220	240	240
London	120	150	140	90	80	90	150
East	110	110	80	80	90	50	80
West Midlands	160	180	120	150	110	140	60
East Midlands	70	70	60	40	50	60	50
North East	20	20	20	10	10	20	20
North West	50	70	50	60	50	50	10
Yorkshire and the Humber	40	50	30	50	40	40	-10
South West	930	1,010	990	1,080	1,190	1,190	-530

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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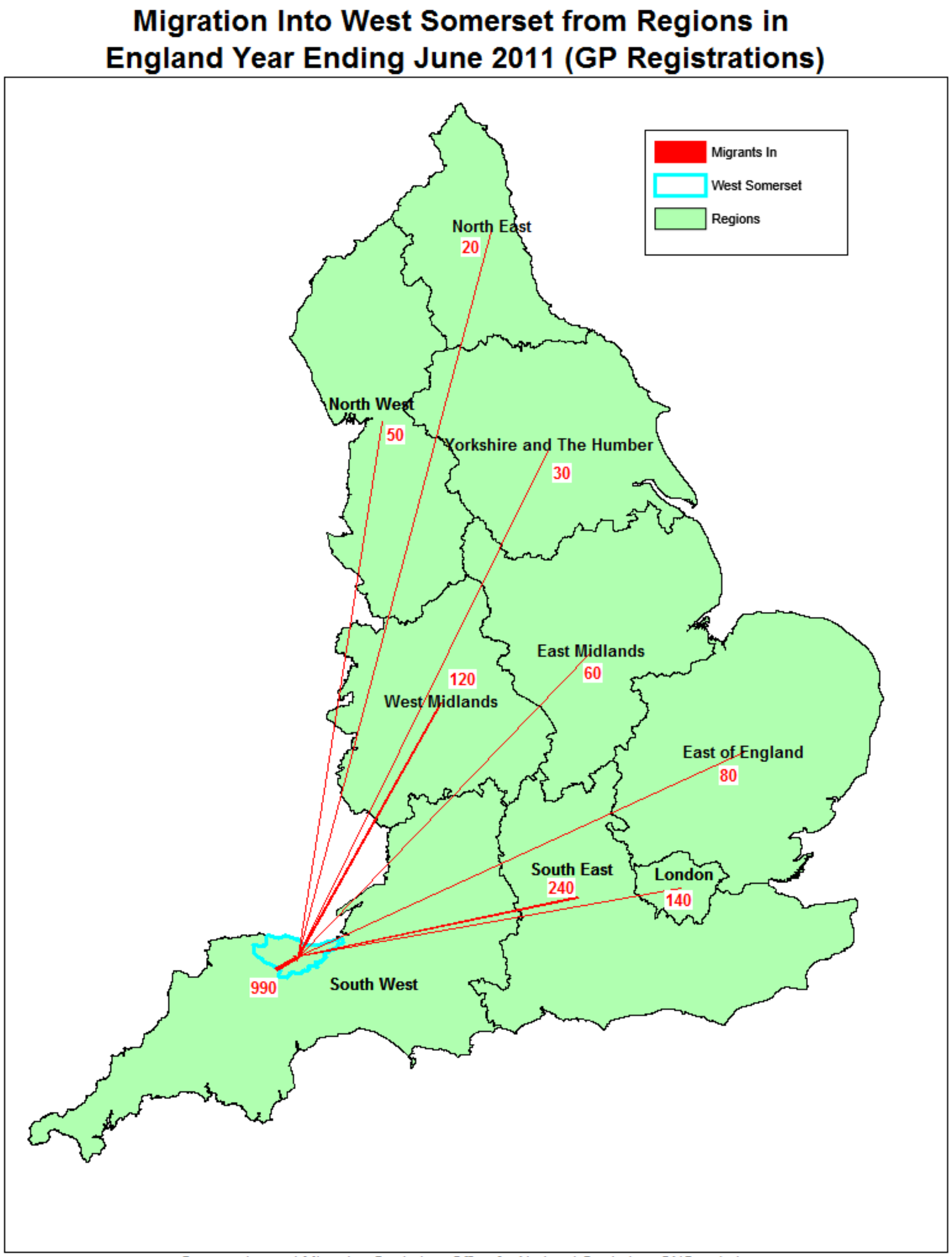
Map 2.9



Source: Internal Migration Statistics, Office for National Statistics, ONS website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence).
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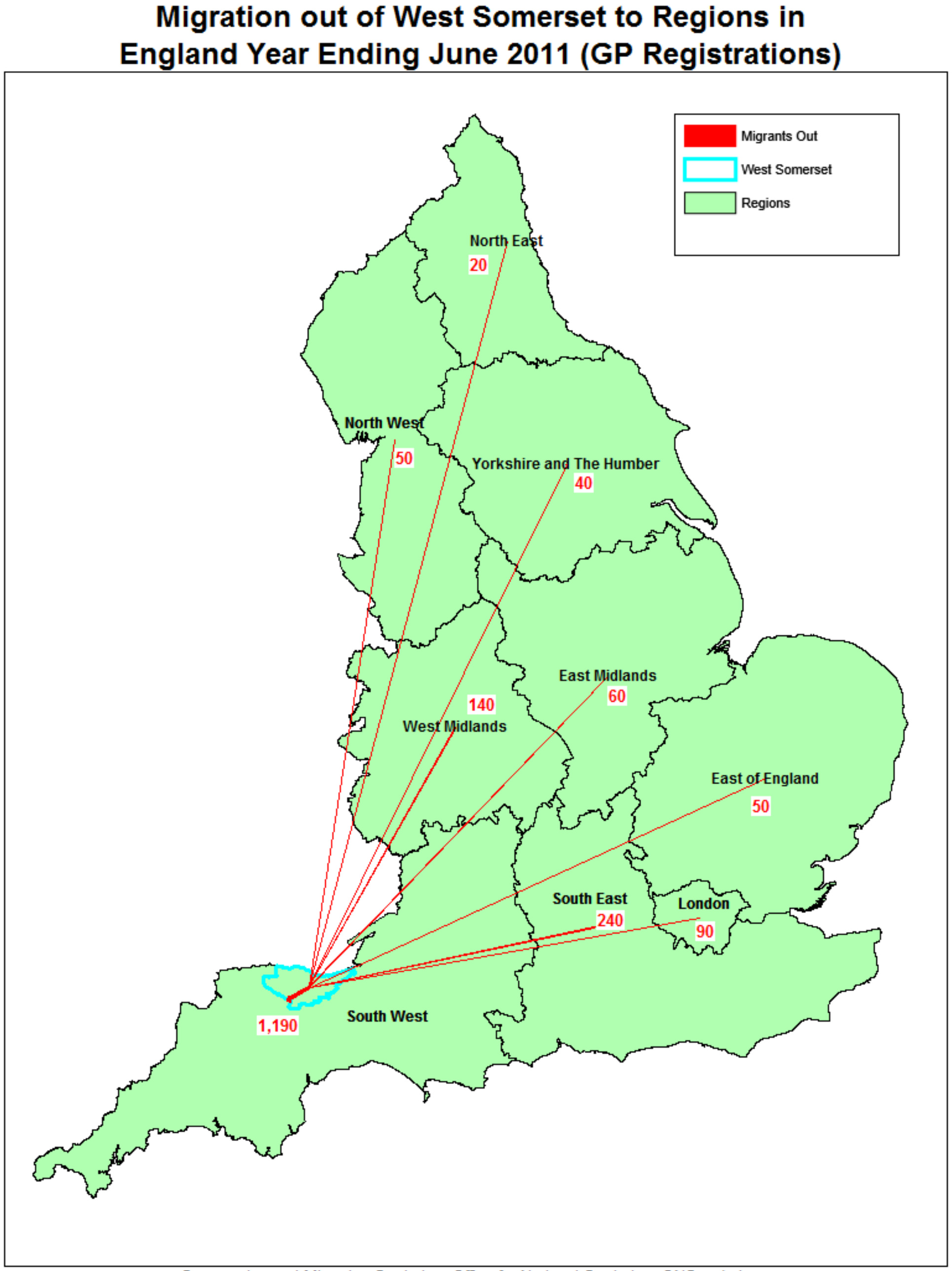
Map 2.10



Source: Internal Migration Statistics, Office for National Statistics, ONS website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence).
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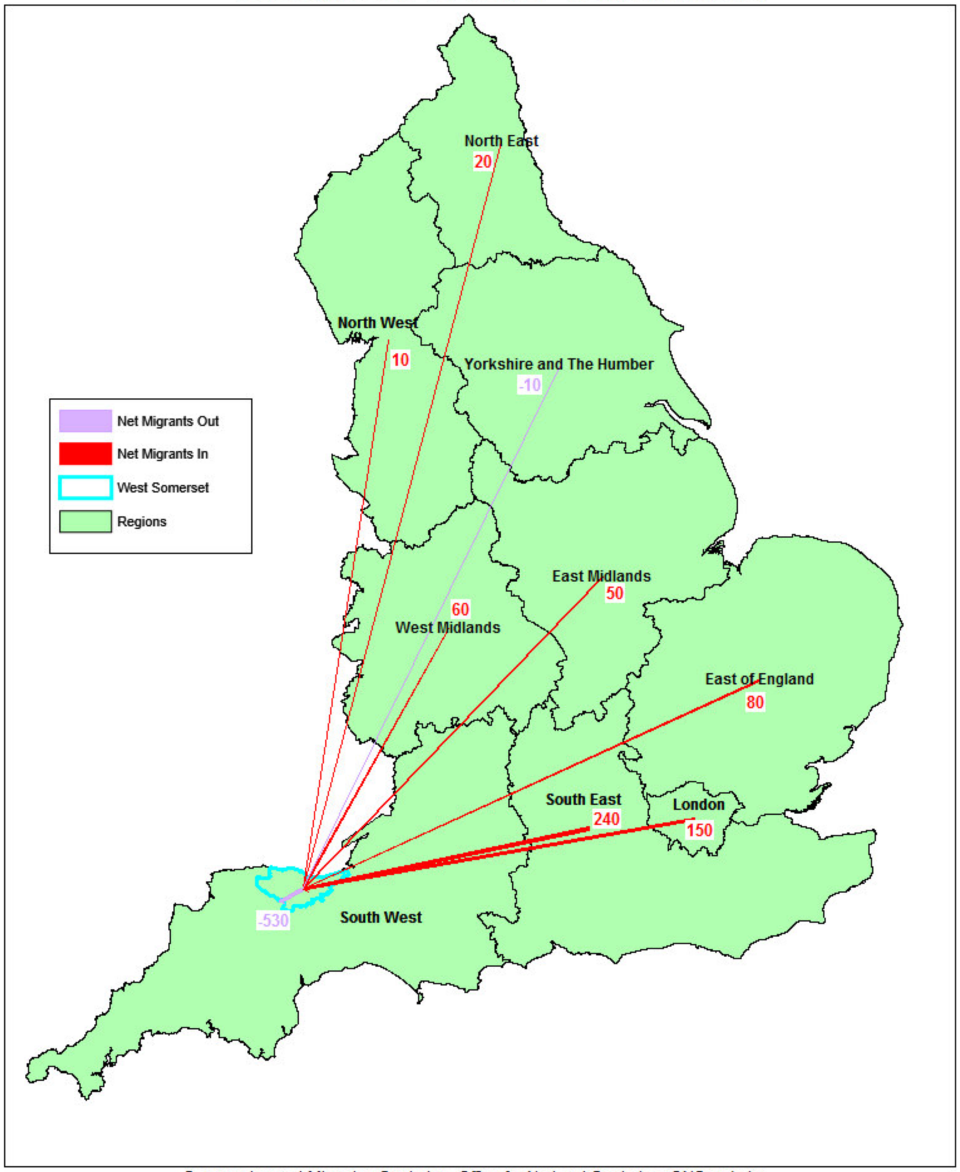
Map 2.11

Net Migration Into/Out of West Somerset from/to Regions in England in the Three Year Period Ending June 2011 (GP Registrations)



Source: Internal Migration Statistics, Office for National Statistics, ONS website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence).
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Key findings:

- During the 3 year period ending June 2011 there were more in migrants than out migrants from all the regions except the South West and Yorkshire & Humber. There was only a small number more out migrants than in migrants in Yorkshire & Humber but the numbers were larger in the South West at Minus 530 Net Migration.

- The largest number of in migrants was 240 from the South East in the 3 year period ending June 2011. The second largest number of In Migrants was from London at Plus 150. These patterns can be seen in more clearly in the Net Migration Regional Map 2.11.

- The net effect of 3 years migration to June 2011 was a gain of only 70 people.

- During the most recent year ending June 2011 the largest number of in-migrants were from the South West; however, there were an even larger number of Out Migrants to the South West. This is shown in Maps 2.9 and 2.10 and Table 2.30.

- The second largest numbers of in migrants were from the South East; however, there were the same number migrating out to the South East as there were migrating in from the South East to West Somerset during the year ending June 2011. This was a change from the previous two years when more were going in than out from the South East.

- The third largest number of in migrants were from London with less people migrating out to London than into West Somerset during the year ending June 2011. This pattern was the same in the previous two years.

- The largest number of out migrants were to the South West, the second largest to the South East and the third largest to the West Midlands in the latest year to June 2011. There were more people going out to the West Midlands than coming in from the West Midlands to West Somerset. This was also a change from previous years where more came in from the West Midlands than those going out.

- It must be remembered that this is a measure of the movement of people and not households. Applying the most reliable average household size from the 2011 Census of 2.1 across the area implies a net gain in the region of 33 households over the 3 year period ending June 2011, or 11 households per annum and an equivalent demand on the housing market.

2.51 The following table considers internal migration at the local authority level and the net effect for West Somerset for the three years ending June 2011.

Please note that anomalies in the balancing figures are due to rounding.

Table: 2.24: Internal Migration, West Somerset, year ending June 2009 to year ending June 2011

Area	2009			2010			2011		
	Persons (Thousands)			Persons (Thousands)			Persons (Thousands)		
	Inflow	Outflow	Balance	Inflow	Outflow	Balance	Inflow	Outflow	Balance
West Somerset	2.0	1.9	0.1	2.1	1.9	0.2	1.8	2.0	-0.2
South West	136.3	116.9	19.4	136.4	117.5	18.9	**136.8**	**117.6**	**19.2**

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- West Somerset gained 100 people in 2008/09 and 200 people in 2009/10 but lost 200 people in 2010/11 therefore the overall gain during the 3 years was 100 people according to the data in Tables 2.31 and 2.32 (Figures in the Regional tables may be different due to rounding). This may well reflect the impact of the economic recession.

2.52 Data on internal migration by age enables limited profiling of the types of people and households moving in and out of West Somerset for example, those aged 0-15 can be associated with parents aged 25-44 to indicate families with children; those aged 16-24 will include students and those aged 65+ are pensioner households. The following table summarises patterns for the three years ending June 2011.

Table 2.25: internal migration by broad ages for three years ending June 2011

Area	Ages	2009			2010			2011		
		Persons			Persons			Persons		
		Inflow	Outflow	Balance	Inflow	Outflow	Balance	Inflow	Outflow	Balance
West Somerset	All ages	2.0	1.9	0.1	2.1	1.9	0.2	1.8	2.0	-0.2
	0-15	0.3	0.2	0.1	0.3	0.3	0.0	0.2	0.3	-0.1
	16-24	0.5	0.6	-0.1	0.5	0.5	0.0	0.4	0.6	-0.2
	25-44	0.5	0.5	0.0	0.5	0.5	0.0	0.4	0.5	-0.1
	45-64	0.4	0.3	0.1	0.5	0.4	0.1	0.5	0.4	0.1
	65+	0.2	0.2	-0.1	0.2	0.2	0.0	0.2	0.3	0.0
South West	All ages	136.3	116.9	19.4	136.4	117.5	18.9	136.8	117.6	19.2
	0-15	18.2	12.2	6.0	18.2	12.5	5.7	18.1	12.3	5.9
	16-24	48.1	48.7	-0.6	46.8	47.5	-0.7	46.3	48.4	-2.1
	25-44	43.8	38.0	5.8	42.1	36.8	5.3	42.4	36.9	5.5
	45-64	18.6	12.3	6.3	20.1	13.4	6.7	20.5	13.0	7.5
	65+	7.7	5.7	2.0	9.2	7.3	1.8	9.5	7.0	2.5

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

The main patterns for West Somerset can be summarised as follows:

- A gain of 300 people in the 45 to 64 year age band during the 3 years ending June 2011, and losses of 300 people in the 16 to 24 year age band, 100 people in the 25 to 44 year age band and 100 people in the 65 plus year age band. Neither a gain nor a loss in the 0 to 15 year age band. It appears that many of those who are leaving are younger people. This may well be for economic reasons in search of employment and/or also students.

- A gain of 100 people in the 45 to 64 year age band during the year ending June 2011 and losses of small numbers of people in all the other age bands, except 65 plus where there was neither a gain or a loss.

2.53 The following table takes the analysis further by identifying those local authorities from which 200 or more people moved into the area in any year over a 3 year period from 2007-2010. Local government reorganisation and the creation of unitary authorities have made direct comparisons difficult.

Table 2.26: internal migration into West Somerset from local authorities where 30 or more moved, for the 3 years ending June 2011 with totals of 100+ highlighted

Local Authority	In Migrants		
	2009	2010	2011
Taunton Deane	220	260	250
Sedgemoor	170	150	160
ersetWest Som	30	60	50
Plymouth UA	30	50	30
Mid Devon	50	50	70
South Somerset	50	50	50
Birmingham	30	40	30
Cornwall UA	40	40	30
Wiltshire UA	40	40	40
City of Bristol UA	40	30	40
North Somerset UA	30	30	40
Teignbridge	30	10	10
South Gloucestershire UA	20	20	30

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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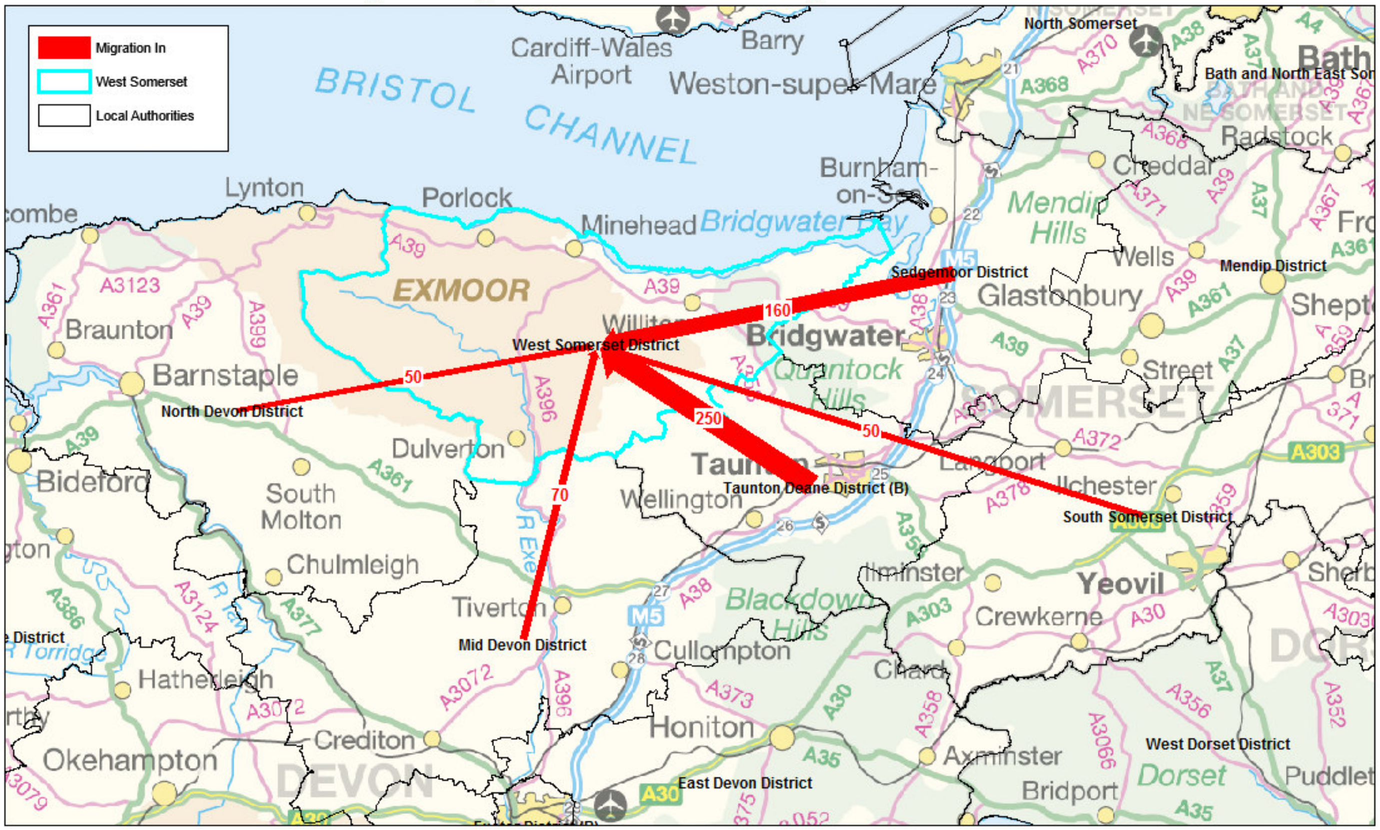
Key findings:

- Taunton Deane and Sedgemoor provided the largest number of migrants into West Somerset, followed by Mid Devon and South Somerset during the 3 year period ending June 2011.

- The following map (Map 2.12) shows that in the most recent year ending June 2011 the largest numbers of in migrants were from Taunton Deane, followed by Sedgemoor, then Mid Devon and then by both West Somerset and South Somerset all of these being local authorities with more than 50 in migrants to West Somerset.

Map 2.12

Migration into West Somerset from local authorities with more than 50 People Registering with a GP Year Ending June 2011



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2.54 The following table identifies those local authorities from which 30 or more people moved out of the area in any one year over a 3 year period ending June 2011

Table 2.27: internal migration out of West Somerset to local authorities where 30 or more moved, for the 3 years ending June 2011 with totals of 100+ highlighted

Local Authority	Out Migrants		
	2009	2010	2011
Taunton Deane	330	380	330
Sedgemoor	130	190	230
Mid Devon	60	50	40
West Somerset	70	50	50
South Somerset	40	50	80
Bristol, City of UA	70	40	60
Plymouth UA	50	40	50
Cornwall UA	30	40	40
Mendip	20	40	20
Wiltshire UA	30	40	50
North Somerset UA	30	30	40
Exeter	20	20	30
Birmingham	20	20	30

(Source: Estimates from NHS Patient Registration with GPs data, Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

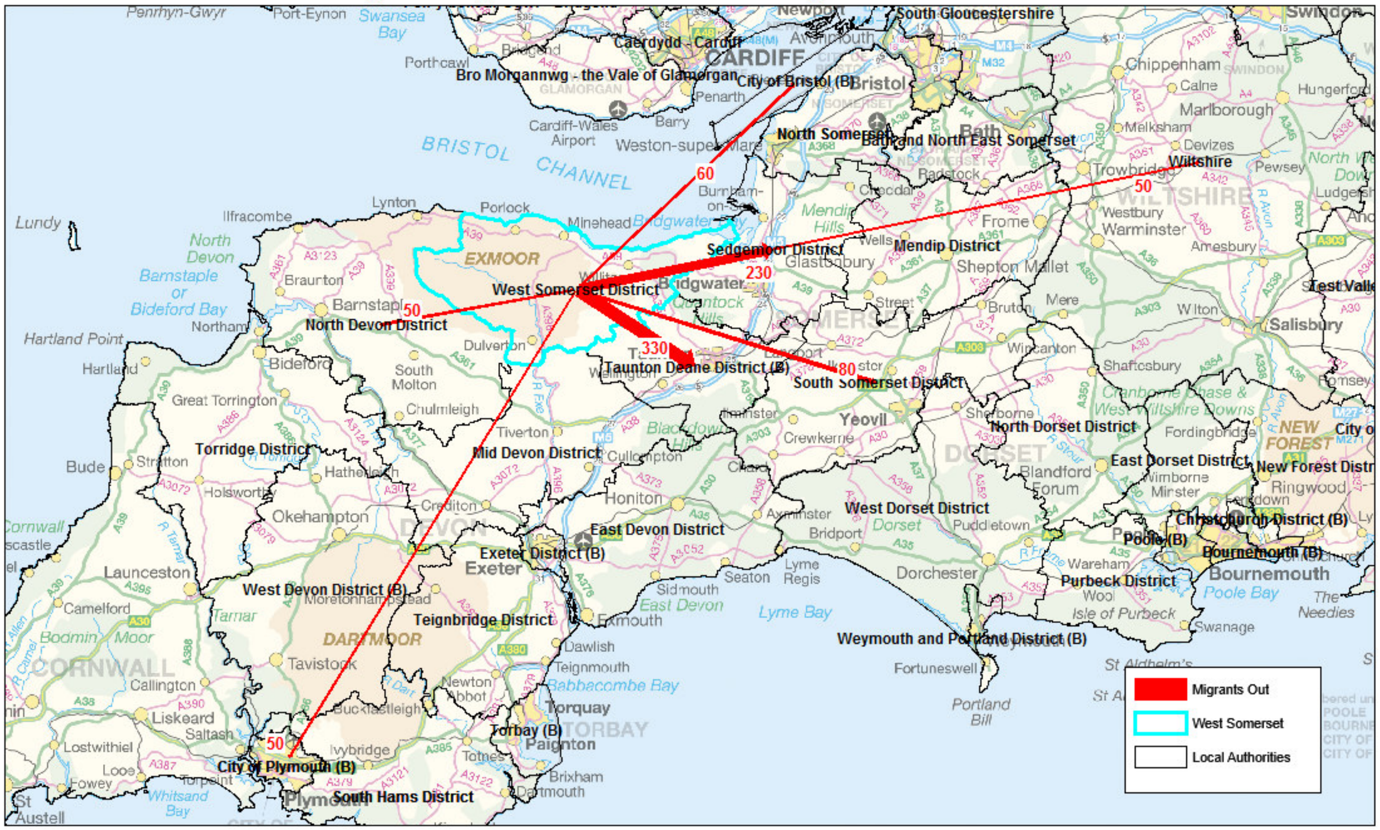
Key findings:

- Taunton Deane and Sedgemoor were the main destinations for people leaving West Somerset followed by West Somerset, South Somerset and Bristol City during the 3 year period ending June 2011.

- Taunton Deane and Sedgemoor were the main destinations for people leaving West Somerset in the one year ending June 2011 followed by South Somerset and Bristol City. These patterns are shown clearly in the following map showing local authorities to which there were 50 or more out migrants.

Map 2.13

Migration Out of West Somerset to local authorities with more than 50 People Registering with a GP Year Ending June 2011



Source: Internal Migration Statistics, Office for National Statistics, ONS website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.55 The following table examines the net effect of movement in and out of the area by local authority for the three years ending June 2011

Table 2.28: net effect of internal migration in and out of West Somerset where net migration is greater than plus or minus 30 in the three years ending June 2011 by main local authority areas

Local authority	In			Out			Net Migration
	2009	2010	2011	2009	2010	2011	
South Gloucestershire UA	20	20	30	10	10	10	40
Birmingham	30	40	30	20	20	30	30
Walsall	20	10	10	10	0	0	30
Brighton and Hove UA	10	10	10	0	0	0	30
Isle of Wight UA	0	20	20	0	0	10	30
Basingstoke and Deane	10	10	10	0	0	0	30
Herefordshire UA	0	0	0	10	10	10	-30
Plymouth UA	30	50	30	50	40	50	-30
West Somerset	30	60	50	70	50	50	-30
Torridge	10	10	0	20	10	20	-30
Cheltenham	10	10	0	10	20	20	-30
Forest of Dean	0	0	10	10	20	10	-30
Mendip	10	20	20	20	40	20	-30
Bristol, City of UA	40	30	40	70	40	60	-60
Sedgemoor	170	150	160	130	190	230	-70
Taunton Deane	220	260	250	330	380	330	-310

(Source: Estimates from NHS Patient Registration with GPs data, ONS Office for National Statistics website, http://www.ons.gov.uk/ons/index.html.
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Please note: some data not available due to boundary changes

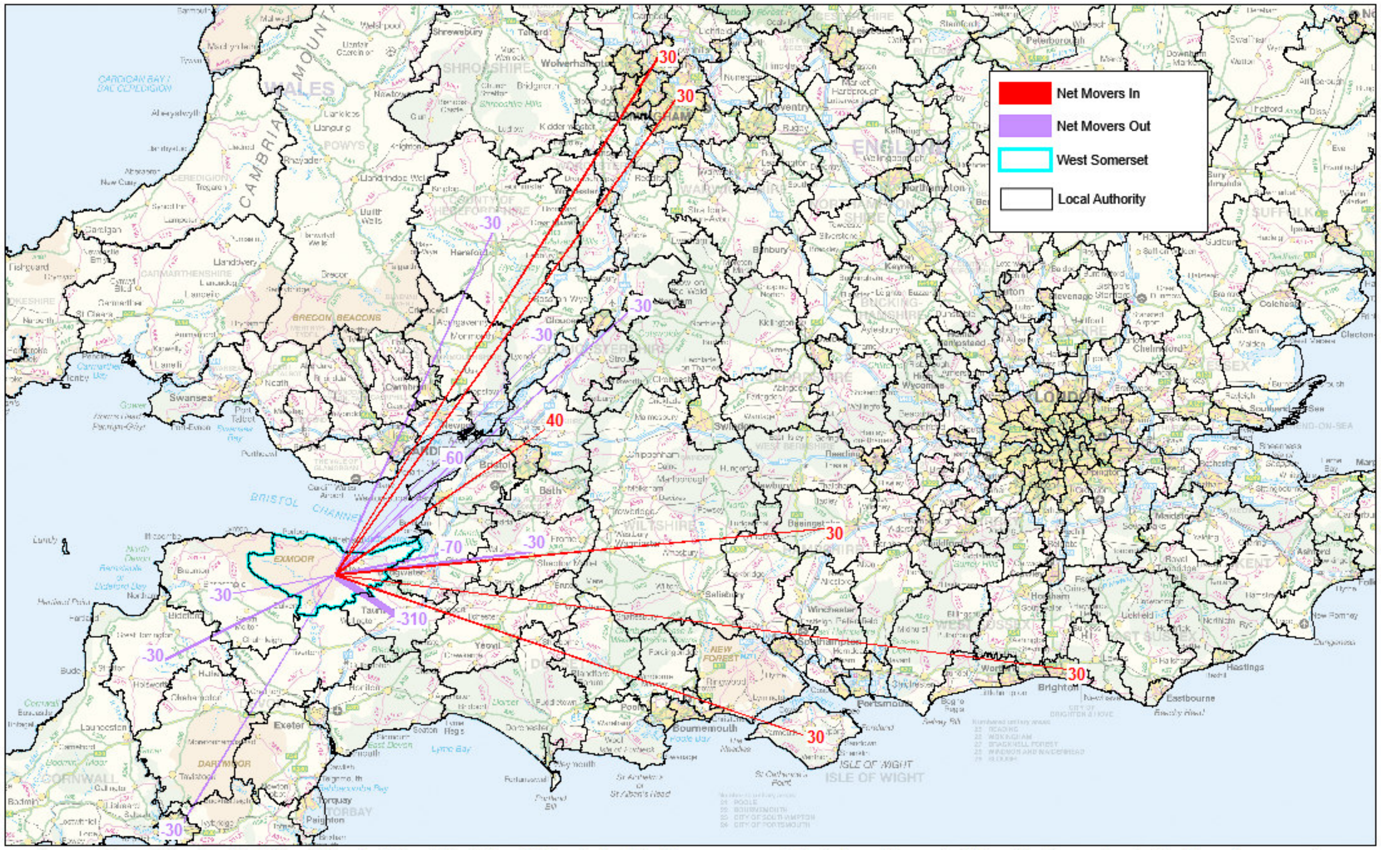
Key findings:

- It is not surprising that that the main flows are in relation to local authorities in the south west, the effect is mainly one of net loss during the 3 year period ending June 2011. The largest net loss is to the neighbouring local authority of Taunton Deane, and the next largest to Sedgemoor.

2.56 The following map highlights net migration of 50 or more people for the 3 years to June 2011 and clearly shows the longer moves of in-migrants and the more local moves of out-migrants.

Map 2.14

Net Migration 30 or more to/from West Somerset for three year period ending June 2011



Source: Internal Migration Statistics, Office for National Statistics, ONS website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

Commuting to work

2.57 Travel to work patterns can have an important impact on housing markets, especially where locations which are attractive to commuters as places to live. The following table summarises the extent of commuting in and out of West Somerset in 2001. **Please note** that the following table includes 11,399 people who both live and work in West Somerset.

Table 2.29: travel into and out of West Somerset to work, 2001

Movement	Numbers
Travel In	13,349
Travel Out	14,318
Net Effect	-969

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, http://www.nomisweb.co.uk/.
Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- In 2001, just over 969 more people travelled to work outside the area than travelled in.

2.58 The following table and addresses the question, *'where do people live who work in West Somerset?'* and identifies the principal flows. **Please note** that Travel to work data from the more recent 2011 Census was not available at the time of completion of this Update. This will be available some time after October 2013 along with other specialist products from the 2011 Census. It should be borne in mind that commuting patterns may well have changed in the context of the economic recession. The following table **excludes** 11,399 people who both live and work in West Somerset.

Table 2.30: travel into work to West Somerset from local authorities where 20 or more travel, 2001

Local Authority	Numbers
Sedgemoor	829
Taunton Deane	514
West Somerset	93
Mid Devon	85
South Somerset	68
Mendip	31
North Somerset	26

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, http://www.nomisweb.co.uk/.
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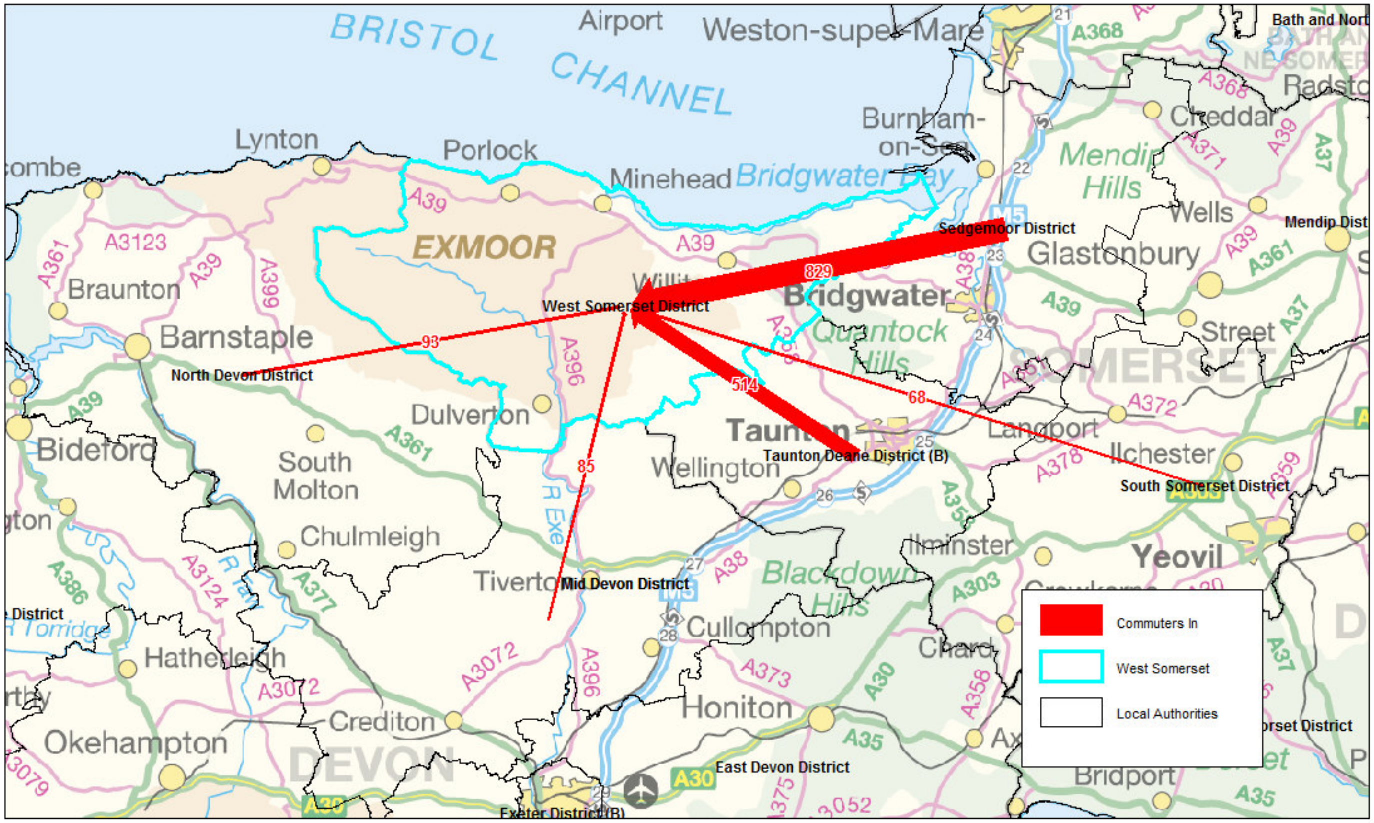
Key findings:

- The main local authorities from which people travelled to work in West Somerset in 2001 are Taunton Deane and Sedgemoor. Other local authorities from which more than 50 people travelled to work in West Somerset are immediately adjacent with the exception of South Somerset. These flows are most clearly seen on the following map.

Map 2.15

Commuters from Local Authorities with more than 50 People Travelling to Work into West Somerset, 2001



Source: Travel to Work, 2001 Census Data, Office for National Statistics, NOMIS website, http://nomisweb.co.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.59 The following table and map address the question, *'where do people work who live in West Somerset?* and identify the principal flows. **Please note** that Travel to Work data from the more recent 2011 Census will be available some time after October 2013 along with other specialist products from the 2011 Census. It should be borne in mind that commuting patterns may well have changed during the economic recession. The following table **excludes** 11,399 people who both live and work in West Somerset.

Table 2.31: travel to work from West Somerset to local authorities where 20 or more travelled out, 2001

Local Authority	Numbers
Taunton Deane	1,360
Sedgemoor	599
Mid Devon	140
South Somerset	100
West Somerset	96
Bristol, City of	62
North Somerset	54
Exeter	51
South Gloucestershire	45
Mendip	41
Westminster	28

(Source: Table 107 UK Travel Flows, 2001 Census, NOMIS website, http://www.nomisweb.co.uk/.
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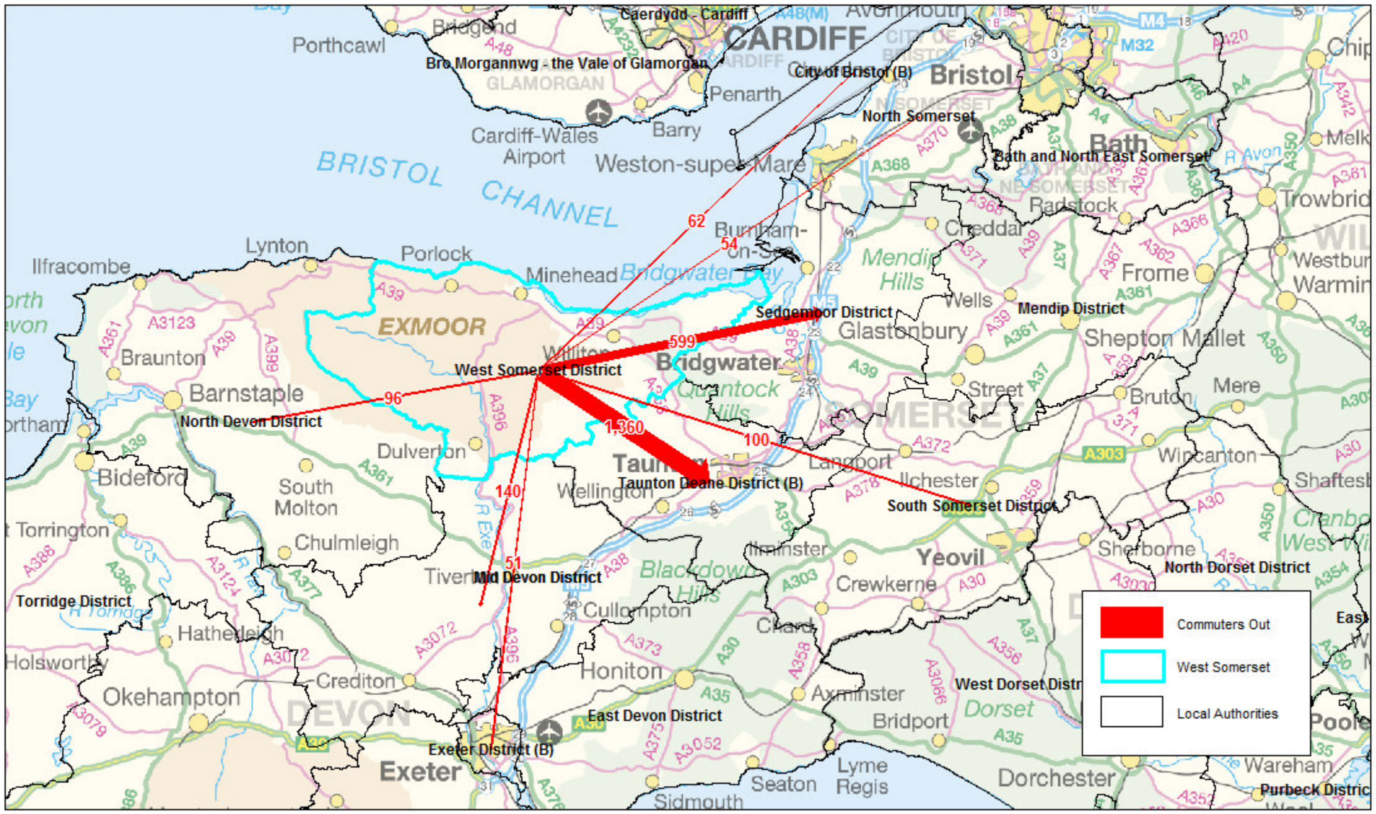
Key findings:

- Commuting out is more widely dispersed than commuting in. The main local authorities to which people travelled to work outside West Somerset in 2001 were Taunton Deane and Sedgemoor followed by Mid Devon and South Somerset. The following map shows the local authorities from where 50 or more persons travelled into work in 2001.

Map 2.16

Commuters to Local Authorities with more than 50 People Travelling to Work from West Somerset, 2001



Source: Travel to Work, 2001 Census Data, Office for National Statistics, NOMIS website, http://nomisweb.co.uk. Contains public sector information licensed under the Open Government Licence v1.0 (http://www.nationalarchives.gov.uk/doc/open-government-licence). Contains Ordnance Survey Data (c) Crown Copyright and Database Right 2012

2.60 The Neighbourhood Statistics website provides an Annual Population Survey (APS) Commuting Tool which can sometimes provide more up to date information on commuting than is available from the 2001 Census. The tool incorporates a significance test to identify the extent of change in commuting patterns between the 2001 Labour Force Survey and 2008 APS. The final two tables consider this data but comparisons must be treated with caution as both rely on limited sample surveys. Whilst not statistically significant, they indicate slight increases in commuting from West Somerset to Taunton Deane, and slightly less workers both living and working in West Somerset in 2008 than in 2001.

Table 2.32: place of residence commuter flows: where do workers live? (commuters in), 2001 and 2008

Workplace	West Somerset		
	2001	2008	Change Significant at 5% level
Residence	%	%	
West Somerset	88.8	83.9	No

(Source: 2001 Labour Force Survey and 2008 Annual Population Survey, APS Commuter Flow, Neighbourhood Statistics Website http://www.neighbourhood.statistics.gov.uk/. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Table 2.33: workplace commuter flows: where do residents work? (commuters out), 2001 and 2008

Residence	West Somerset		
	2001	2008	Change Significant at 5% level
Workplace	%	%	
West Somerset	77.3	72.6	No
Taunton Deane	8.6	11.7	No

(Source: 2001 Labour Force Survey and 2008 Annual Population Survey, APS Commuter Flow, Neighbourhood Statistics Website. http://www.neighbourhood.statistics.gov.uk/. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Analysis and conclusions

Population and household profile

2.61 West Somerset is distinctive in its older age profile having the population with the highest mean and median ages in England and Wales. The above average proportion of older residents is reflected in both household size and composition. Over one third are single person households, especially single older households, and over one third of households consist only of people aged 65+. As a corollary, the district and LPA areas have lower proportions of family households of all types.

2.62 The significance of these patterns is threefold:

1. there will be a proportionately higher level of the under-occupation of family housing which will continue unless options to downsize are available;
2. there will be a proportionately greater requirement for housing which meets the requirements of older households, including housing with care; and
3. there will be a future increase in housing supply through turnover as older people downsize, transfer to housing with care or reach the end of their lives.

Ethnic composition

2.63 In common with most predominantly rural areas, the district has not experienced high levels of international migration, and this is reflected in a non-White ethnic population amounting to 1.3-1.4% of the total, compared with 2.6% for the south west. There are no large ethnic groups, the largest category ‘Other White’ constitutes under 1,000 or 2.4-2.7% of the overall population.

2.64 The following table identifies, from a total of 29 countries of origin, the main countries from which people have migrated. Total numbers for the main countries are small, the main change over time is the increase in migration from the A8 central/east European countries which acceded to the EU in 2004 including Poland, Lithuania and Slovakia and the A2 countries, Bulgaria and Romania, which joined in 2007.

2.65 It is likely from experience elsewhere that their requirements have been met mainly by the private rented sector and from renting from family or friends. It is also likely that small communities have now been established accompanied by a shift in demand from single or shared accommodation towards larger family homes. Research is required to confirm such patterns and their impact on the housing market.

Occupational, income differences and deprivation

2.66 West Somerset is characterised by lower incomes than regionally or nationally and by a polarisation between lower and higher income groups. There was a lower proportion of people employed in better paid Occupational Groups 1 to 3 than in the south west and nationally, average gross household incomes are 20% below the UK average and average full-time incomes from employment are 17% below the regional and 22% below the national averages. However, more people are in paid employment, and the level of dependency on Out of Work Benefits is lower than the regional average or nationally.

2.67 As a proxy for income, nearly one fifth of households had no car or van in their household, but in contrast, at over one quarter, there was a higher percentage of households with two cars than nationally or regionally.

2.68 There are higher levels of relative and multiple deprivation in only a few small areas in the area, especially in two areas around Williton and Minehead but, interestingly, a very large rural area in the Exmoor National Park which has the highest deprivation for Indoors Living, quite high deprivation for Wider Barriers and very high deprivation for geographical barriers to accessing amenities.

2.69 The implications of these patterns of low incomes in a high value housing market are clear, market housing will be unaffordable without support and there will be higher levels of need for affordable housing.

Population and household change

2.70 The principal drivers at work across the area now and in the future are the 10% projected growth in the number of households and the very large projected increase in the oldest populations and households. Those aged 65+ are projected to increase by over 50% increase between 2001 and 2035, which represents almost 6,000 older people. The increases are much greater for older age groups including 139% growth in those aged 85+ (from 1,800-4,300 people) when the need for housing with care is the greatest. The same pattern is being experienced throughout the country as ‘baby boomers’ born immediately after the Second World War reach retirement age and older. The scale of the projected growth in the older population is dramatic, and coincides with improvements in health and well being which extend life expectancy.

2.71 There are three main implications for housing systems of this growth in the older population:

1. older people are increasingly likely to be home owners, to own their home outright and to occupy family housing. The growth in the older population is associated with a growth in owner occupation amongst the retirement population. Such home owners have the potential either to release equity or to move to a smaller dwelling as appropriate.

2. older people are least likely to move home. The 2009-10 Survey of English Housing recorded that only 1.7% of people aged 65+ moved home. Most older people continue to live in family housing and one of the central principles of social care is to support older people to live in their existing homes. The effect of low moving rates combined with support to live in existing homes is that many older people will be under-occupying homes which are too large to meet their requirements, and which may be difficult to manage. The end result will be a 'log jam' in the supply of family housing and a dramatic increase in the need for home-based care.

3. alternatives to conventional housing will be both desirable and necessary and the supply of designated, sheltered and extra-care housing will need to increase. There is no benchmark for the proportion of older people willing and able to 'downsize' though work undertaken by Housing Vision identifies a minimum of 10% are <u>willing</u> to downsize, a figure which may well increase as the choice of aspirational options improves. However, the proportion of older people requiring designated, sheltered and extra-care housing is much clearer. The level of requirement is dealt with in Chapter 6 below.

2.72 The growth in the older population partly explains the projected growth in households, and especially smaller households. However, there are a number of other factors at work which include:

- people living independently for longer;
- a major shift from marriage to co-habitation resulting in earlier but less stable relationships;
- women delaying childbirth; and
- relationship breakdown which results in the requirement for 2 homes.

2.73 As can be seen, many factors underpin the projected increase in households, but other trends may have the reverse effect, including:

- the growth in multi-generational or other shared households through economic necessity or to provide care and support for those in need; and
- the growth in forms of communal or collaborative living among older people also to provide care and support.

2.74 It is too early to determine the scale of these trends but it is essential to monitor evidence of lifestyle change and its impact on housing requirements.

2.75 Between 2011 and 2031, the number of households is projected to increase by 21% in West Somerset with much larger increases for certain household types, including in relation to:

- single person households: a growth of 50% most of whom will be older people;
- couple households: a growth of only 5%, most of whom will be older people;
- family households: a 19% growth in lone parent households. This is less certain than for single or couple households as it is dependent on the continuation of recent trends of relationship breakdown.
- The areas of projected decline concern other families and couples with one or more adults. Ironically, the latter is the most uncertain projection as recent trends may reverse if more younger people live with parents for economic reasons.

2.76 Each of these trends has distinct implications for the housing system:

- for singles and couples: an increase in the requirement for smaller 2 bed properties; and
- for families: the small increase in the requirement for family housing is complicated by the projected large increase in lone parent households who have incomes typically around one third of the average. The implication of a substantial increase in the requirement for family housing affordable to lone parents is clear.

Internal migration and mobility

2.77 A key component of demographic change is internal migration which is included in population projections using trend-based analysis, and is measurable through ONS 'Components of Population Change' tables. Although 2011 data will be required to confirm this, internal migration is the most significant single component of projected population change for West Somerset identifying a net increase of 6,800 people in the period 2012-2031.

2.78 West Somerset has continued to gain population through migration internal to England, and between 2001 and 2011, the district gained 2,100 people in this way

2.79 Not surprisingly, most internal and cross-regional migration takes place within the South West but there are population exchanges with the London, South East, East and West Midlands regions.

2.80 The net effect has been population gain from the London and the South East regions in particular, and the main losses to elsewhere in the South West, especially to Taunton Deane and Sedgemoor.

2.81 The limited data by age identifies that the main losses are of those aged 16-24 and 25-44 which will include families with younger children and those leaving for educational or employment opportunities. Interestingly, there was also a small net loss of those aged 65+. The only group which saw net gain was those aged those aged 45-64 which may be indicative of early retirement.

2.82 In terms of the implications for the housing market, the loss of families with children reduces pressure on the demand for family housing.

Commuting

2.83 Understanding such patterns is constrained by the limited data available. In 2001, 969 more people travelled to work outside the area than travelled in. The main local authorities to which people travelled to work were Taunton Deane and Sedgemoor. Data from the 2008 Annual Population Survey suggests some limited change in commuting patterns with a slight increase in commuting to Taunton Deane.

3. Housing Stock and Supply

Introduction

3.1 Using a wide variety of authoritative secondary sources, this section reviews patterns and trends in the housing market across the area since 2001 as the basis for understanding the balance between supply and demand and the future requirement for housing. A distinction is made between:

- housing stock - the number of dwellings; and
- housing supply - the number of dwellings available annually to rent or purchase due to turnover from the existing stock and from new supply resulting from construction, conversions and bringing empty homes back into use.

Setting the baseline: patterns and trends in the housing stock

Property type

3.2 The following table summarises the baseline position by accommodation type in 2011 and the sub-section closes with a detailed estimate of stock by tenure.

Table 3.1: accommodation type, West Somerset LPA and DC areas, 2011

Property Type	West Somerset LPA		West Somerset DC			South West	England
	No	%	No	%	Rank	%	%
Accommodation type: Whole house or bungalow: Detached	4,256	32.2	6,354	36.1	95	29.8	22.3
Accommodation type: Whole house or bungalow: Semi-detached	3,961	30.0	5,179	29.4	206	27.2	30.7
Accommodation type: Whole house or bungalow: Terraced (including end terrace)	2,515	19.0	3,216	18.3	246	23.2	24.5

Accommodation type: Flat; maisonette or apartment: Purpose Built block of flats or tenement	1,396	10.6	1,504	8.5	247	12.8	16.7
Accommodation type: Flat; maisonette or apartment: Part of a converted or shared house (including bed-sits)	686	5.2	831	4.7	66	5.0	4.3
Accommodation type: Flat; maisonette or apartment: In commercial building	229	1.7	329	1.9	19	1.2	1.1
Accommodation type: Caravan or other mobile or temporary structure	167	1.3	181	1.0	47	0.8	0.4
All Categories: Household Spaces	13,209	100.0	17,594	100.0		100.0	100.0

(Source: Table KS401EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- Compared with the national pattern, the main differences are the much higher proportion of detached houses in the West Somerset DC area and the lower proportions of terraced houses and flats. Semi-detached houses are only slightly lower than the national percentage.

- The patterns in the West Somerset LPA area are closer to the national and South West patterns than for West Somerset DC as a whole with the exception of flats that are part of a converted or shared house where percentages were a little higher than for West Somerset DC, the South West and nationally.

- However, care must be taken in assuming that detached houses in rural areas are necessarily large, as many may be cottages with a small number of bedrooms. Properties by number of room and bedrooms are reviewed below.

Tenure

3.3 The following table summarises the baseline position in 2011.

Table 3.2: tenure type, West Somerset LPA and DC areas, 2011

Tenure	West Somerset LPA		West Somerset DC			South West	England
	No	%	No	%	Rank	%	%
Owned: Owned Outright	5,311	44.4	7,024	45.0	6	35.4	30.6
Owned: Owned with a mortgage or loan	2,755	23.0	3,397	21.7	336	32.0	32.8
Shared ownership (part owned and part rented)	63	0.5	72	0.5	262	0.8	0.8
Social Rented: Council	147	1.2	181	1.2	327	5.8	9.4
Social Rented: Other	1,555	13.0	2,107	13.5	27	7.5	8.3
Rented from: Private landlord or letting agency	1,708	14.3	2,189	14.0	127	15.2	15.4
Private Rented Other	215	1.8	321	2.1	33	1.9	1.4
Living Rent Free	209	1.7	332	2.1	16	1.4	1.3
All Categories: Tenure	11,962	100.0	15,623	100.0		100.0	100.0

(Source: Table KS402EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk.
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Key findings:

- Compared with the regional and especially the national pattern, there was a much lower proportion of Social rented council housing and a higher level of Other social rented housing in the West Somerset DC area. Social rented housing as a whole only made up 14.7% of the total housing stock in 2011 in the West Somerset DC area which compares with 13.3% in the South West and 17.7% nationally.

- The lower proportion of social renting is an immediate concern in view of the lower incomes which typify the area.

- 14.2% of the housing stock in the West Somerset LPA area was social housing. There was a higher percentage of Other social housing (13.0%) than in the South West (7.5%) and nationally (8.3%), and a lower percentage of council rented housing (1.2%) compared to (5.8%) in the South West and (9.4) nationally.

- At 67.4% in the West Somerset LPA area and 66.7% in West Somerset DC, owner occupation was higher than the national figure of 63.4% but similar to the South West (67.4%). Outright owner occupation was higher in both the LPA area (44.4%) and DC area (45.0) than in the South West (35.4%) and nationally (30.6%). This may well reflect the high percentage of older persons living in West Somerset.

Number of rooms and bedrooms

3.4 A key indicator when profiling the supply of housing is the number of bedrooms. The 2001 Census data in the table below shows only the number of habitable rooms i.e. excluding bathrooms, toilets, halls or landings.

Table 3.3: number of rooms, West Somerset LPA and DC areas, 2011

Rooms	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
1 room	59	0.5	73	0.5	0.6	0.8
2 rooms	186	1.6	226	1.4	2.6	2.9
3 rooms	935	7.8	1,111	7.1	8.9	10.3
4 rooms	2,324	19.4	2,873	18.4	18.4	19.2
5 rooms	2,853	23.9	3,592	23.0	23.3	24.7
6 rooms	2,324	19.4	3,091	19.8	19.5	19.4
7 rooms	1,383	11.6	1,869	12.0	11.4	10.1
8 rooms	885	7.4	1,248	8.0	7.5	6.3
9 or more rooms	1,012	8.5	1,540	9.9	7.9	6.4
All household spaces with at least one usual resident	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table QS407EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk.
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Key findings

- There was a lower percentage of homes with 1, 2, or 3 rooms in the West Somerset LPA area (9.9%) and in the West Somerset DC area (9.0%) than in the South West (12.1%) and nationally (14.0%).

- The percentage of homes with 4, 5 and 6 rooms was the same in West Somerset DC and the South West (61.2%) and slightly below the national average(63.3%). It was 62.7% in West Somerset LPA area.

- There was a higher percentage of homes with 7 or more rooms in the DC area (29.9%) and LPA area (27.5%) than in the South West (26.8%) and nationally (22.8%).

3.5 The following table shows the number of bedrooms according to the 2011 Census.

Table 3.4: number of bedrooms, West Somerset LPA and DC areas, 2011

Bedrooms	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
No Bedrooms	17	0.1	21	0.1	0.2	0.2
1 Bedroom	1102	9.2	1,318	8.4	10.7	11.8
2 Bedrooms	3,595	30.1	4,546	29.1	27.3	27.9
3 Bedrooms	4,994	41.7	6,491	41.5	40.4	41.2
4 Bedrooms	1,631	13.6	2,238	14.3	16.1	14.4
5 or More Bedrooms	624	5.2	1,009	6.5	5.3	4.6
All Household Spaces with at least one usual resident	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table QS411 EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- The proportion of homes of different bedrooms sizes in the LPA area is similar to the regional and national pattern in the West Somerset LPA area although there is a slightly lower percentage of 1 and 3 bed homes and slightly higher percentages of 2, 3 and 5 plus bed homes.

- The proportion of homes of different bedroom sizes in the DC areas is similar to the regional and national pattern, although there is a lower percentage of 1 homes and slightly higher percentages of 2, 3 and especially 5 plus bed homes.

- The lower proportion of 1 bed properties is a concern in terms of access to the housing market in a lower income area.

3.6 The table below shows the average number of rooms and bedrooms in West Somerset DC compared to the South West and England and also the average household size.

Table 3.5: average household size and average number of rooms and bedrooms in West Somerset, 2011

Indicator	West Somerset DC		South West	England
	No	Rank	No	No
Average household size	2.1	340	2.3	2.4
Average number of rooms per household	5.8	86	5.6	5.4
Average number of bedrooms per household	2.8	139	2.8	2.7

(Source: Table QS403 EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk.
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Key findings

- The average number of rooms per household in the West Somerset DC area was slightly higher than in the South West and England in 2011.
- The average number of bedrooms in West Somerset DC was the same as in the South West and only very slightly higher than for England in 2011.

Dwellings by Council Tax band

3.7 The following table summarises dwellings by Council Tax band in 2011.

Table 3.6: dwellings by Council Tax band in West Somerset, 2011

Council Tax Band	West Somerset		South West		England	
	No	%	No	%	No	%
Band A	2,760	15.8	419,924	17.6	5,701,030	24.8
Band B	3,818	21.9	584,185	24.5	4,494,194	19.6
Band C	3,716	21.3	549,671	23.0	4,992,524	21.8
Band D	3,372	19.3	376,998	15.8	3,513,171	15.3
Band E	1,804	10.3	251,019	10.5	2,166,533	9.4
Band F	1,272	7.3	127,235	5.3	1,144,117	5.0
Band G	677	3.9	72,975	3.1	805,748	3.5
Band H	47	0.3	7,239	0.3	130,183	0.6
Total	17,466	100.0	2,389,246	100.0	22,947,500	100.0

(Source: Dwellings by Council Tax Band; Neighbourhood Statistics Website http://www.neighbourhood.statistics.gov.uk/.

Key findings

- There was a higher percentage of higher Council Tax Band (F-H) homes in West Somerset (11.5%) than in the South West (8.7%) and England (9.1%).
- Conversely, there was a lower percentage of low Council Tax band (A and B) homes in West Somerset (37.7%) than in the South West (42.1%) and England (44.4%).
- However, it must be remembered that as the property values on which these bandings have been based have not been updated since 1st April 1991, they may no longer be a valid indication of current market values.

Under-occupation and overcrowding

3.8 Under-occupation and overcrowding are likely to be experienced at different stages of the life cycle. Under-occupation is more likely to affect older people living in family housing from which children have moved on. Overcrowding is more likely to affect younger people with dependent children who are in need of more bedrooms. Under-occupation and overcrowding can therefore, be two sides of the same coin, where a reduction in under-occupation by older people can increase the supply of family housing for younger households.

3.9 The Occupancy Rating provides a measure of whether a household's accommodation is overcrowded or under-occupied. There are two measures of occupancy rating, one based on the number of rooms in a household's accommodation, and one based on the number of bedrooms. Based on a standard formula which assesses the relationship between household members according to their ages and gender, it relates the actual number of rooms or bedrooms in a property to the number of rooms or bedrooms ‘required’ by the members of that household. The number of rooms/bedrooms required is subtracted from the number of rooms/bedrooms in the household's accommodation to obtain the occupancy rating. An occupancy rating of -1 implies that a household has one fewer room/bedroom than required (overcrowded), whereas +1 implies that they have one more room/bedroom than the standard requirement (under-occupying).

3.10 A bedroom is defined as any room that was intended to be used as a bedroom when the property was built, or any room that has been permanently converted for use as a bedroom. It also includes all rooms intended for use as a bedroom even if not being used as a bedroom at the time of the Census. Bedsits and studio flats are counted as having one bedroom. Set out below is a description of how the number of bedrooms/rooms required is calculated as follows:

- A one-person household requires three rooms and one bedroom.

3.11 The **room** requirements for a multi-person household are calculated as follows:

1. One room per couple or lone parent;
2. One room per person aged 16 and above who is not a lone parent or in a couple;
3. One room for every two males aged 10-15, rounded **down**;
4. One room for every pair of males of whom one is aged 10-15 and one is aged 0-9, if there are an odd number of males aged 10-15;
5. One room for a remaining unpaired male aged 10-15 if there are no males aged 0-9 to pair him with;
6. Repeat steps 3-5 for females;
7. One room for every two remaining children aged 0-9 (regardless of gender), rounded **up**;
8. Add two rooms to this total.

3.12 The **bedroom** requirements for a multi-person household are as follows:

1. One bedroom per couple;
2. One bedroom per person aged 21 or over not in a couple;
3. One bedroom for every two males aged 10-20, rounded **down**;
4. One bedroom for every pair of males of whom one is aged 10-20 and one is aged 0-9, if there are an odd number of males aged 10-20;
5. One bedroom for a remaining unpaired male aged 10-20 if there are no males aged 0-9 to pair him with;
6. Repeat steps 3-5 for females;
7. One bedroom for every two remaining children aged 0-9 (regardless of gender), rounded **up**.

3.13 Applying the Occupancy Rating:

- An occupancy rating of +2 or more suggests there are 2 or more rooms more than are 'required' according to the definition, i.e. there is more than one spare room and there is under-occupation; and

- An occupancy rating of -1 suggests there is one less room than is 'required' according to the definition, i.e. there are not enough rooms for the number of people and there is overcrowding.

3.14 Using the Occupancy Rating, the following table summarises the level of under-occupation and overcrowding for all households at the time of the 2011 Census.

Table 3.7: under-occupation and overcrowding, West Somerset LPA and DC areas, 2011

Indicator	West Somerset LPA		West Somerset DC		South West	England
	No	%	No	%	%	%
Occupancy rating (rooms) of -1 or less	534	4.5	639	4.1	6.4	8.7
Occupancy rating (bedrooms) of -1 or less	286	2.4	339	2.2	2.9	4.8
Occupancy Rating 2+ All Households Bedrooms	4,916	41.1	6,843	43.8	38.7	34.3
Occupancy Rating 2+ All Households Rooms	7,002	58.5	9,536	61.0	55.1	49.7
All Households	11,962	100.0	15,623	100.0	100.0	100.0

(Source: Table QS408 and 411 EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk.

Key findings:

- Overcrowding is less of a problem in West Somerset:

  - Using the bedroom occupancy rating, 2.4% of households in the West Somerset LPA area and 2.1% in West Somerset DC area were overcrowded compared with 2.9% in the South West and 4.8% nationally.
  - Using the room occupancy measure, 4.5% of households in the LPA area and 4.1% in the DC area were overcrowded compared with 6.4% in the South West and 8.7% nationally.

- There is a higher level of underoccupation in West Somerset:

  - Using the bedroom occupancy measure, 41.1% of households in the LPA area and 43.8% in the DC area were under-occupied compared with 38.7% in the South West and 34.3% nationally.

- Using the room occupancy measure, 58.5% of households in the LPA area and 61.0% in the DC area were under-occupied compared with 55.1% in the South West and 49.7% nationally.

Vacant, second and holiday homes

3.15 It is difficult to determine the current rate of second and holiday homes from 2011 Census data as current outputs relate to either people or homes. The following table estimates the **number of people** with second and holiday homes in West Somerset, the number of homes or households is not provided and cannot be estimated with accuracy until further Census data is released.

Table 3.8: the number of people resident outside West Somerset with second homes in the district, 2011

All usual residents	Usual residents elsewhere with a second address in this area	Type of second address			
	All second address types	All second address types	Second address: working	Second address: holiday	Second address: other
34,675	2,387				
100%	6.9%	6.9%	0.6%	3.3%	3.0%

Source: Table 1a Second Addresses, 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk and NOMIS website, http://www.nomisweb.co.uk.
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Key Findings

- In 2001, 2,387 people who were usually resident in another local authority had second addresses in West Somerset, equivalent to 6.9% of the usual resident population; 3.3% used their second homes as holiday homes which compares with a second home rate of 4.44% in 2001.

- Census Table QS106 'Second addresses' also identifies 1,431 people usually resident in West Somerset who had a second address elsewhere in the UK.

3.16 The following tables estimate the **number of vacant homes** in West Somerset at 2011 which also includes second addresses.

Table 3.9: vacant homes in West Somerset, 2011

Categories	West Somerset		South West	England
	No	%	%	%
Household spaces with at least one usual resident	15,623	88.8	94.0	95.7
Household spaces with no usual residents	1,971	11.2	6.0	4.3
All categories: household spaces	17,594	100.0	100.0	100.0

(Source: Table KS401EW 2011 Census data, Office for National Statistics website, http://www.ons.gov.uk. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/)

Key Findings

- 11.2% of household spaces (1,971 household spaces) in West Somerset were vacant in 2011, a very high rate exceeding both the regional percentage (6.0%) and the national percentage (4.3%), and a considerable increase from a vacancy rate of 3.37% in 2001.

- However, this total will include second and holiday homes most of which were likely to be vacant on the Census enumeration day. Whilst the number of homes or households cannot be estimated with accuracy until further Census data is released, if all second homes were owned by 2 adults, this would account for 1,194 vacant homes, reducing the rate to 777 homes or 4.4%, and close to the rate at 2001.

Trends in residential completions

Overall completions

3.17 Completions increase the supply of market and affordable housing, an essential contribution given the recent and projected increases in household numbers. This section reviews trends in residential completions in general, by sector and bedsize, no private sector demolitions were recorded over this period. The following table summarises trends between 2002 and 2012.

Table 3.10: all residential completions in West Somerset 2002-2012

2002/ 2003	2003/ 2004	2004/ 2005	2005/ 2006	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012	Total
117	198	123	213	265	141	122	71	48	109	1,407

(Source: WSC residential completions data)

Key findings:

- 1,407 properties have been completed since 2002, the annual total had declined after 2006-07 but revived in 2011-12.

Completions by tenure

3.18 The following table summarises trends in all and affordable housing completions between 2006 and 2012 in the context of affordable housing completion rates for the south west and England.

Table 3.11: all and affordable residential completions in West Somerset, 2006-2012

Area	Type	2006/ 2007	2007/ 2008	2008/ 2009	2009/ 2010	2010/ 2011	2011/ 2012	Total No.	Total %
West Somerset	All	80	100	40	30	20	60	330	84.62%
	Afford.	0	0	0	20	10	30	60	-
	% affordable	0	0	0	40	33.33	50.00	-	15.38%
South West	% affordable	20.93	32.42	33.39	38.73	32.45	25.55	-	30.58%
England	% affordable	23.76	28.16	36.55	43.25	37.71	24.60	-	32.34%

(Source: CLG Live Table 253 Housebuilding: permanent dwellings completed by tenure and district. CLG website http://www.communities.gov.uk/corporate/.
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Key findings:

- Of 390 dwelling completions between 2006 and 2012, 15% were affordable, ratios which were substantially below the regional and national averages of 30.6% and 32%.

Affordable housing completions by sector

3.19 The following table uses local authority data to examine output by affordable housing sector for the period 2006-2012.

Table 3.12: affordable residential completions by type in West Somerset, 2006-2012

Year	Rent	Low cost home ownership	All Affordable
2006/07	18	9	27
2007/08	8	17	25
2008/09	13	16	29
2009/10	42	13	55
2010/11	11	3	14
2011/12	18	41	59
Total no.	**110**	**99**	**209**
% of affordable	**52.63%**	**47.37%**	**100%**

(Source: West Somerset local authority housing completions data)

Key findings:

- Of 209 affordable completions:
    - 53% were social rented; and
    - 47% were for low cost home ownership.

The private rented sector

Introduction

3.20 The private rented sector has grown in size and significance since 2001 and this section profiles the sector across both districts by type of stock, the level of supply through turnover and rental levels. The following data sources have been consulted:

- the property websites ‘rightmove’ and ‘findaproperty’; and

- the Valuation Office Agency database. The Valuation Office Agency (VOA) database holds lettings information collected as part of the VOA’s responsibility to administer the rent officer functions related to Housing Benefit (Local Housing Allowance and Local Reference Rents) on behalf of the Department for Work and Pensions (DWP). The Agency provides no information on the proportion of private rentals on which a decision is made, but Housing Vision’s working estimate is that it applies to the lower 40% of the market where rents are eligible for Local Housing Allowance (LHA). Consequently, VOA data is useful in profiling the private rented housing available to lower income households.

Stock and supply profile

3.21 The 2011 Census identified a total of 2,510 privately rented homes in West Somerset, representing 16% of the total and 332 households living rent free (2% of the total), similar proportions to the south west and England.

3.22 The following table estimates the supply of homes from the private rented sector by profiling the number of properties available for letting on a calendar month basis across the three months, September 2012 to March 2013.

Table 3.13: the private rented sector in West Somerset by property type, average number of properties advertised for the 6 months September 2012 to March 2013 (rounded to 5)

Type of accommodation	Average	
	Number	%
Detached	25	23
Semi-detached	10	10
Terraced	20	20
Flats/apartments	45	41
Bungalows	10	10
Total advertised	**110**	**100%**

(Source: rightmove.co.uk)

Key findings:

- An average of 110 properties was advertised between September 2012 and March 2013
- The main property types advertised were flats (41%) compared with a 2011 stock of 15% (See Table 3.1); 23% were detached compared with a 2011 stock of 36% and 20% were terraced houses compared with a 2011 stock of 18%. Only 10% were semi-detached houses compared with a 2011 stock of 29%. This profile suggests that smaller households are at an advantage and families at a disadvantage in accessing properties in the private rented sector.

3.23 Useful data on rent levels and the profile of the rental stock by bedsize is recorded by the Valuation Office Agency in the course of determining Local Housing Allowances by Broad Rental Market Areas (BRMA). West Somerset falls into 2 BRMAs, North Devon and Taunton and West Somerset: Mid and East Devon; West Somerset; Taunton and West Somerset. Maps of the relevant BRMAs for West Somerset are available at:

https://lha-direct.voa.gov.uk/SearchResults.aspx?LocalAuthorityId=360&LHACategory=999&Month=2&Year=2013&SearchPageParameters=true

3.24 The following table provides a range of monthly rentals for 476 properties assessed for LHA from 1st October 2011 to 30th September 2012.

Table 3.14: the number, average, lower quartile, median and upper quartile market rents recorded by the VOA in West Somerset, 2011-12

Area	Number of Rents	Average Rent	Lower Quartile Rent	Median rent	Upper Quartile Rent
West Somerset	476	£598	£450	£575	£675

(Source: VOA Residential Rental Market Statistics)

Key findings:

- Based on 476 decisions in 2011-12, the average rent recorded was £598, ranging from a lower quartile figure of £450 to an upper quartile rent of £675.

- 476 properties implies an annual turnover of 22% of the 2,189 properties rented from a private landlord or lettings agency recorded by the 2011 Census.

3.25 The following table provides more detailed information concerning the number of rents and average rents by bedsize for properties assessed by the VOA for LHA from 1st October 2011 to 30th September 2012. Rooms refers to rooms in shared properties.

Table 3.15: the number of market rents and averages by property type and bedsize, assessments for LHA in West Somerset, VOA, 2011-12

	Number of rents	% of rents	Average rent	Lower Quartile Rent	Median rent	Upper Quartile Rent
Rooms	20	4.23	£343	£303	£338	£390
Studio	0	0	0	0	0	0
1 bed	68	14.38	£474	£450	£475	£499
2 bed	169	35.73	£575	£525	£575	£600
3 bed	172	36.36	£647	£600	£650	£700
4 bed	44	9.30	£871	£750	£842	£998
All	473	100%	-	-	-	-

(Source: VOA Residential Rental Market Statistics)

Key findings:

- The LHA market is skewed towards smaller properties, 54% were 2 bed or less in West Somerset. This profile suggests that smaller households are at an advantage and families at a disadvantage in accessing the private rented sector.

- However, no studio properties were recorded which is of particular concern in view of changes in LHA eligibility with the effect that single people under 35 can only gain support for shared housing.

The home ownership sector

3.26 This section uses Land Registry data to profile the supply of housing from the home ownership sector. The following table summarises the number of sales and average property prices between 2008 and 2012.

Table 3.16: the annual volume of sales and average property prices in West Somerset, 01.04.08-30.04.12

Year	West Somerset	
	No. of Sales	Average Price
1/4/2008 to 30/4/2009	419	£236,470.66
1/4/2009 to 30/4/2010	525	£224,625.53
1/4/2010 to 30/4/2011	488	£229,488.70
1/4/2011 to 30/4/2012	550	£223,459.98
Total	1,982	-
Annual average	496	£228,003.57

(Source: Land Registry)

Key findings:

- The average number of transactions over the 4 year period was 496, increasing from 419 in 2008/09 to 550 in 2011/12 with some fluctuation in the two years in between. This is in contrast to the national picture of decline and is obviously indicative of continuing demand.

- As a proportion of total stock of 10,493 owner occupied homes, an average of 496 annual sales is equivalent to a turnover rate of 4.7% in West Somerset and 5.2% in 2011/12.

- The average price at £223.5k has fallen by 5.5% since 2008-09

3.27 The following table summarises the number of sales and average price by property type by local authority area between April 2011 and 2012.

Table 3.17: average property price by type of dwelling in West Somerset, 01.04.11 to 30.04.12

Property type	West Somerset		
	No. of Sales	% of Sales	Average Price £
Detached	186	33.8	£326,216.48
Semi Detached	149	27.1	£206,768.42
Terraced	137	24.9	£160,952.32
Flats and Apartments	78	14.2	£120,099.47
Overall	550	100.0	£223,459.98

(Source: Land Registry)

Key findings:

- Sales of detached properties have held up, they made up more than one third (33.8%) of total sales compared with a 2011 stock of 36.1%.

- Sales of semi-detached houses have also held up, they made up 27.1% compared with a 2011 stock of 29.4%.

- Terraced houses made up just under one quarter (24.9%) of total sales, compared with a 2011 stock of 18.3% - which suggests a higher level of turnover of properties of this type.

- Flats and apartments made up 14.2% compared with a 2011 stock of 15.1%.

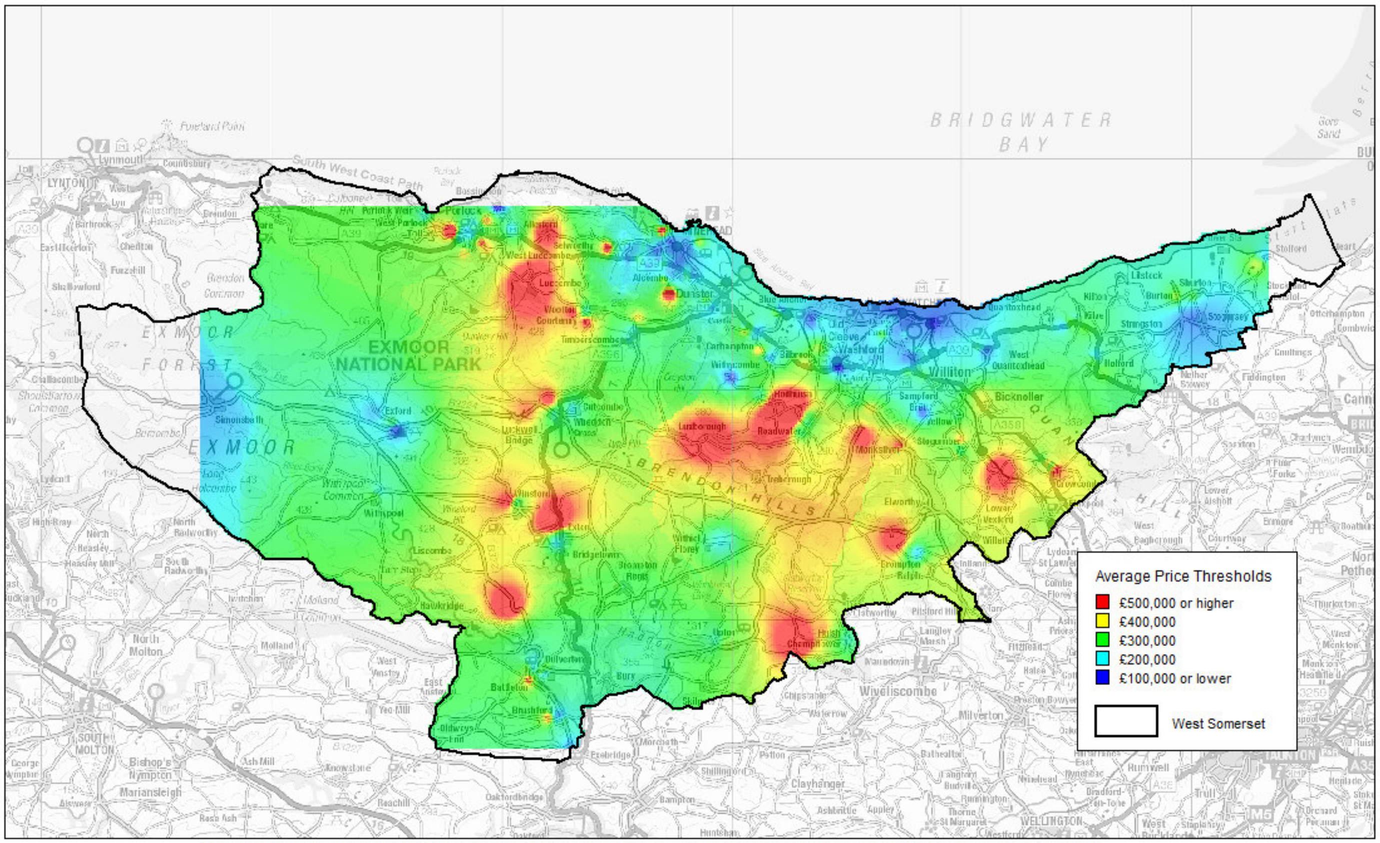
3.28 The following map identifies the spectrum of average sales prices and enables lower and higher prices hot spots to be identified for the 550 properties sold in West Somerset between 1st January 2011 and 30th April 2012. Please note that the maps are constructed around price thresholds as indicated then shade colours applied according to the averages between them; the white fringe areas are a product of the software. The maps have been created using the inverse distance weighting method of interpolation in MapInfo thematic mapping options. This method is used for data values that produce arbitrary values over the grid and is especially suited to sparse data. Two strong patterns are evident:

  - towns are generally cheaper than rural areas; and

  - the house price hotspots are in deep rural locations, especially in the Exmoor National Park.

Map 3.1

Average House Prices in West Somerset from 1/1/2011 to 30/4/2012



Source: Land Registry Sales, Land Registry. Contains Ordnance Survey data (c) Crown copyright and database Right 2012.
Contains Royal Mail data (c)Royal Mail copyright and database right 2012. Contains National Statistics (c) Crown copyright and database right 2012.

The intermediate housing sector

3.29 The intermediate housing sector consists of market housing provided at a discount to enable access to home ownership or market housing. Schemes have been mainly variants of shared ownership or have provided sub-market rental such as Intermediate Rental. Detail of current schemes to help home owners are available at:

https://www.gov.uk/affordable-home-ownership-schemes

3.30 The 2011 Census recorded only 72 shared ownership properties, the turnover of which is notoriously low as staircasing to full ownership is not typical. Even if a 5% turnover rate is applied which is close to the full cost sector, this implies a supply of no more than 4 properties per annum.

The social rented sector

3.31 This section uses recent and current data provided by the choice based lettings scheme, Homefinder Somerset, to provide a profile of the supply of social rented homes.

3.32 The following table identifies the number of social rented properties advertised by type and bed size between January 2009 and July 2012.

Table 3.18: number of social rented properties advertised by type and bed size in West Somerset, 1st January 2009-7th July 2012 (42 months)

Type & Bedsize	Supply	Proportion
Bedsit/ Studio	7	-
Sub-total	*7*	*0.9%*
1 bed		
Bungalow	121	-
Flat	105	-
Maisonette	34	-
House	5	-
Sub-total	*265*	*33.9%*
2 bed		
Bungalow	123	-
Flat	67	-
Maisonette	10	-
House	123	-
Sub-total	*323*	*41.3%*
3 bed		
House	167	-
Sub-total	*167*	*21.4%*
4 bed		
House	18	-
Sub-total	*18*	*2.3%*

5/6 bed		
House	2	-
Sub-total	*2*	0.3%
Total no.	**782**	**100%**

(Source: Homefinder Somerset)

Key findings:

- The table identifies that of 782 social rented properties advertised.:
  - 35% were 1 bed or less;
  - 41% were 2 bed;
  - 21% were 3 bed, and
  - 3% were 4+ bed.
- The average number of properties advertised over 42 months was equivalent to 204 annually or 8.92% of stock

3.33 Introduced in 1980, the Right to Buy resulted in a contraction in the stock of local authority social rented housing, especially of houses. The scheme was extended to housing association tenants under the Right to Acquire in 1997. However, limitations on eligibility and reductions in purchase discounts introduced in 2005 have reduced the number of sales dramatically. CORE sales data records 5 Right to Buy and Right to Acquire sales in West Somerset between 2007-08 and 2010-11.

3.34 The following table identifies the average rents charged for social rented properties in 2010-11.

Table 3.19: average social rents by type and bed size in West Somerset, 2011-12

Type & Bedsize	West Somerset
1 bed	£67.48
2 bed	£82.84
3+ bed	£96.18

(Source: CORE)

Housing supply profile

3.35 The following table summarises the current annual supply of housing through turnover by sector as follows.

Table 3.20: the current annual supply of housing through turnover in West Somerset, June 2012

Indicator	Owner occupied	Private rent	Social rent	Intermediate	Total
Total stock	10,421	2,842	2,288	72	
% of stock	66.7	18.2	14.7	0.5	
Turnover: annual supply as % of stock by tenure	5.2%	30.0%	8.92%	4.0%	-
Annual supply	542	853	204	3	1,602
% of all supply of housing	33.8%	53%	12.7%	0.2%	100%

(Source: 2011 Census and Housing Vision estimates)

Key findings:

- The home ownership sector provides almost 13% of housing supply although it represents 67% of total stock.

- The private rented sector is estimated to play the main role in the supply of housing, currently providing in the region of half (53%) of available properties, although it constitutes only 18% of all housing stock;

- The social sector provides 9% of available homes although it represents almost 15% of total stock.

- The intermediate sector has a very marginal role providing 0.2% of available supply and 0.5% of total stock.

Analysis and conclusions

Overall patterns and trends

3.36 West Somerset's housing stock is distinctive in the much higher proportion of detached houses, the lower proportions of terraced houses and flats and the low proportion of social rented housing. All these patterns are of concern in a lower income area. In contrast, owner occupation and especially outright owner occupation were higher than in the south west or nationally, which may well reflect the high proportion of older residents.

3.37 As a direct reflection of the stock profile, the area has a lower percentage of homes with 1, 2, or 3 rooms but a higher percentage with 7 or more rooms. There are slightly lower percentages of 1 and 3 bed homes and slightly higher percentages of 2, 4 and 5 plus bed homes. The lower proportion of 1 bed properties is of concern in terms of access to the housing market for low income households.

3.38 Based on the 'occupancy rating' which identifies that there are 2 or more rooms more than are 'required' by households, an average of 59-61% of all households are under-occupying, rising to 63% for pensioner households. These rates are well above the regional and national averages which is unsurprising in view of the proportionately larger older population in the district.

3.39 It is estimated that 2% of all households are overcrowded, a much lower rate than regional or national averages, which implies a good supply of family housing.

3.40 Second and holiday homes can be sensitive issues. Currently 2,387 people have second homes in the district, 6.9% of the total, and an increase from 4.44% in 2001.

3.41 760 new homes were completed between 2002 and 2012 at an average of 76 per annum. This compares closely with an estimated requirement from the 2008 NP SHMA for an average of 194 new homes annually.

3.42 The district has a very high vacancy rate of 11.2% of household spaces (1,971) which exceeds both the regional percentage (6.0%) and the national percentage (4.3%). This is a considerable increase from a vacancy rate of 3.37% in 2001. Whilst some of these vacancies can be explained by the currently depressed state of the housing market, it is not clear why this level is so high.

3.43 Additions to the affordable housing stock between 2006 and 2012 amounted to 15% of new homes in West Somerset. Data on affordable completions across the area since 2001-02 indicates that 53% were social rented and the remainder were intermediate housing, including intermediate rent and shared ownership.

The private rented sector

3.44 The private rented sector has almost doubled since 2001, from 10% to almost 18% of homes in the LPA area and to over 18% across the district. It now provides an estimated supply of over 850 lettings per year, four times the contribution of the social rented sector.

3.45 Monitoring over a 6 month period identified an average of 110 properties advertised at any one time, whose profile is mainly very different from the overall stock. Over 40% were flats or apartments which is much higher than a total stock of 16-19%; 23% were detached homes which is lower than a stock of 32-36%; 20% were terraced, which is close to the stock average and 10%

were semi-detached (compared with a stock of 30%) and 10% were bungalows.

3.46 The growth of the private rented sector has good and bad points. It has been important in extending flexibility and choice, and in maintaining a supply of housing when turnover has reduced in the home ownership and social rented sectors. However, homes purchased by investors are likely to be those accessible to first time buyers which has the effect of further excluding them from the market and placing an upward pressure on lower value prices.

3.47 Valuation Office Agency data for 2011-12, which typically profiles the lower 40% of the market, identified that 2 bed properties or smaller made up over half of properties on which a rent determination was made; 36% were 3 bed and 9% were 4 bed. Such a breakdown mirrors the breakdown of rented homes advertised by property type. In the context of the application of the Local Housing Allowance shared accommodation rate to all single people under 35 years old, only 4% of properties were shared or bedsit accommodation.

3.48 Overall, the private rented sector is likely to be more effective in meeting the requirements of single people and couples - whose numbers will continue to increase - and the requirements of smaller family households.

The home ownership sector

3.49 The growth in private renting has resulted in the home ownership sector falling in proportionate terms from 71% of all homes in 2001 to 67% in 2011. However, compared with the national picture which has generally seen a drop in completed sales, the sector has maintained and increased sales volumes equivalent to a turnover rate in 2011 of almost 5%.

3.50 Annual average prices fell after April 2009 and have still not recovered to that level. Reflecting the profile of the housing stock, detached properties made up almost 34% of sales in 2011-12 and semi-detached homes 27% which is of sales; terraced houses made up over 25% - which is above the stock average - and flats and apartments only 14% - which is below the stock average. The figure for flats and apartments reflects the difficulty first time buyers are experiencing in entering the housing market. Towns are generally cheaper than rural areas and there are major house price hotspots in deep rural locations especially in the Exmoor National Park area.

3.51 Overall, as most sales are of houses, the home ownership sector is currently more effective in meeting the requirements of families and is less effective for singles and couples, demand from whom will continue to increase.

The intermediate housing sector

3.52 The intermediate housing sector makes a negligible contribution to the housing stock and supply and, despite the emphasis placed on its development in recent years, it has failed to take root in the housing system. Only 72 properties or 0.5% of the total stock were recorded as shared ownership in 2011 and even if the full cost 5% turnover rate is applied, no more than 4 homes would become available each year.

The social rented sector

3.53 The social rented sector has remained stable proportionately since 2001 at just over 14% of all stock. There are currently 2,288 social rented properties across the district (a reduction of 60 properties since 2001) and 1,702 in the LPA area, over 14% of all stock.

3.54 As a result of turnover, an average of 204 social rented properties are available across the district each year, most lettings are of the smaller properties, typically 35% are 1 bed; 41% are 2 bed, only 21% are 3 bed and 3% are 4 bed or larger.

3..55 In common with the private rented sector, the requirements of singles, couples and smaller family households are more likely to be met by the social rented sector whose numbers will continue to increase.

4. The Need and Demand for Housing

Introduction

4.1 This chapter reviews evidence of the need and demand for housing with the emphasis on affordable housing. Whilst it is recognised that Homefinder Somerset data may underestimate the underlying level of housing need, it provides the only comprehensive and consistent data identifying patterns of need. It is further recognised that in a high demand area, many people may be deterred from applying. The primary data sources used in this section are:

- Homefinder Somerset in relation to social housing applications, advertisements and lettings; and
- Core in relation to social housing lettings and intermediate housing sales.

4.2 Since December 2008, affordable housing providers in the district have participated in Homefinder Somerset, a choice based lettings scheme. The following 5 Priority Bands are applied to applicants as follows:

Emergency Priority Housing Need

The following are examples of the type of situations that would qualify:

- urgent medical assessment;
- urgent housing defect; and
- to escape violence or threat of violence, serious harassment or a traumatic.

Gold Band: High Housing Need

The following are examples of the type of situations that would qualify:

- statutorily homeless households;
- overcrowded lacking 2 or more bedrooms;
- under-occupying by 2 or more bedrooms;
- a high medical priority; and
- a Category 1 housing defect.

Silver Band: Medium Housing Need

The following are examples of the type of situations that would qualify:

- overcrowded lacking 1 bedroom;
- medium medical priority; and
- moves for work.

Bronze Band: Low or No Housing Need

This will normally include applicants who live in a property that is adequate to meet their housing needs, the following are examples of the type of situations that would qualify:

- low medical priority;
- applicants awaiting a move on confirmation.

Full details of the scheme can be found at:

http://www.homefindersomerset.co.uk/Data/ASPPages/1/30.aspx

The need for affordable housing

4.3 It is normal practice, and now a government requirement for eligibility for Housing Benefit, to 'fully occupy' properties, i.e. to allocate properties by bedsize according to applicants' household size and composition with no spare bedroom available. In general, this will mean that a 1 bed property will be allocated to a single person or a couple; a two bedroom property to a lone parent/couple and 1 or 2 children dependent on age and sex; a three bedroom property to a lone parent/couple and 2 or 3 children dependent on age and sex and a four bedroom property to a lone parent/couple and 3-5 children dependent on age and sex.

4.4 At 30th June 2012, there were 1,220 applicants registered in West Somerset as follows

Table 4.1: applicants for social housing by Priority Band and current bedsize required, June 2012

	Bedsize required					*Total*	
Band	**1**	**2**	**3**	**4**	**5**	**No.**	**%**
Gold	340	225	94	8	2	669	54.8
Silver	48	18	12	6	6	90	7.4
Bronze	278	109	49	25	0	461	37.8
Total no.	666	352	155	39	8	1,220	100%
Total %	54.6	28.9	12.7	3.2	0.7	-	100%

(Source: Homefinder Somerset data)

Key findings:

- 55% were in the Gold high housing need band and 38% in the low/no housing need band;

- The greatest registered requirement was for 1 bed properties (55% of all applicants), with requirements decreasing as property sizes increases.

Homelessness and rough sleeping

4.5 The following table identifies the pattern of households accepted as homeless and in Priority Need since 2001-02.

Table 4.2: homeless accepted and in Priority Need, 2001-2011

2001-2002	2002-2003	2003-2004	2004-2005	2005-2006	2006-2007	2007-2008	2008-2009	2009-2010	2010-2011
102	129	83	108	62	29	43	18	34	31

(Source: HSSA Returns, Table 784 and Table 627 Local Authorities Actions under Homeless Provisions of the Housing Acts CLG website http://www.communities.gov.uk/corporate/. Contains public sector information licensed under the Open Government Licence v1.0 http://www.nationalarchives.gov.uk/doc/open-government-licence/.)

Key findings:

- From a peak of 129 households in 2002-03, acceptances have fallen steadily to 2008-09 but have shown an increase to 31 in 2010-11 which is likely to be associated with economic recession and associated increases in repossessions and redundancy, etc.

4.6 The most recent rough sleeping count undertaken in autumn 2011 identified no rough sleepers in West Somerset.

The need for specialised housing

4.7 The following table profiles applicants requiring special accommodation, categories are not mutually exclusive.

Table 4.3: applicants requiring adapted housing or housing with support, 30th June 2012

Requirement	Type of accommodation	Number
Housing with support	Extra care housing	3
	Housing with a support worker	10
	Sheltered housing	59
Adapted housing	Housing adapted for a physical disability	63
	Housing adapted for wheelchair use	11

(Source: Homefinder Somerset data)

Key findings:

- Just over 70 applicants identified special requirements, mostly for sheltered or adapted housing. The availability of appropriate accommodation could well free up other housing stock, especially larger family dwellings, to meet wider needs

The demand for affordable housing by property type

4.8 There are two common indicators of the demand for social housing, the time required to obtain a tenancy for the bedsize required and the ratio of applicants to turnover. The following table establishes the first by comparing the number of applicants registered for properties of different sizes with the annual supply.

Table 4.4: the number of years to house all applicants registered for social housing by bedsize required, May 2012

Bedsize	No. of applicants	Annual supply	Applicant to supply ratios/ years to house all applicants
Bedsit/1	1,424	125	11.4:1
2	806	72	11.2:1
3	374	25	15.0:1
4	103	1	103.0:1
5+	29	1	29.0:1
Total	2,736	224	12.2:1 (average)

(Source: Homefinder Somerset data)

Key findings:

- Due to very low supply, the ratios of applicants by bedsize were highest for 4 bed or larger properties in both districts. The next largest ratio in West Somerset was for 3 bed properties, for bedsits/1 bed properties.

- It would take a minimum of 11 years to clear the backlog of demand for any property type in West Somerset (bedsit, 1 or 2 bed properties).

The demand for affordable housing by property type and bedsize

4.9 This section considers the extent of demand for different types of housing by bedsize. It is important to emphasise that an applicant can bid for multiple properties and certain conditions may be placed on certain properties, for example, a local connection. The following table identifies the number of bids by property type and bed size for each letting advertised and, in order to increase the averaging effect and reduce the impact of multiple bidding and application of certain conditions, all lettings undertaken between 1st January 2009 and 7th July 2012 have been considered.

Table 4.5: ratio of bids to properties advertised for social rented properties by type and bed size, January 2009 - July 2012

Type & bedsize	Properties advertised	Bids	Ratio of bids to each advert
Studio	7	11	1.5:1
Bungalow	244	3,443	14.1:1
Flat	172	3,105	18.1:1
Maisonette	44	36	0.8:1
Flat/maisonette	-	538	-
House	315	6,471	20.5:1
Total nos.	**782**	**13,604**	**17.4:1**
Studio	7	21	3.0:1
1 bed	265	3,348	12.6:1
2 bed	323	7,274	22.5:1
3 bed	167	2,793	16.7:1
4 bed	18	158	8.8:1
5 bed	2	10	5.0:1
Total nos.	**782**	**13,604**	**17.4:1**

(Source: Homefinder Somerset data)

Key findings:

- Highest demand is for houses then flats and for 2 bed then 3 bed properties.

Registrations by household size

4.10 This section considers who is registered for housing. The first dimension considered is the size of households being housed.

Table 4.6: registrations by size of household, 30th June 2012

Household size	West Somerset	
	No.	%
1	458	37.5
2	369	30.2
3	160	13.1
4	133	10.9
5	60	4.9
6	19	1.6
7	15	1.2
8	5	0.4
9	1	0.1
Total	1,220	100%

Key findings:

- Over two thirds of those registered for social housing are 1 or 2 person households.

Registrations by age

4.11 The following table profiles social housing registrations by the age of the lead household member.

Table 4.7: registrations by age of lead household member, 30th June 2012

Age band (years)	West Somerset	
	No.	**%**
17-21	85	7.0
21-29	257	21.1
30-39	228	18.7
40-59	358	29.3
60+	287	23.5
Not Known	5	0.4
Total	1,220	**100%**

(Source: Homefinder Somerset data)

Key findings:

- Registrations by age are almost divided between those below or above 40. Only 28% are aged under 30 compared with almost one quarter over 60.

Registrations by ethnicity

4.12 The following table profiles registrations by the ethnicity by main applicant.

Table 4.8: registrations by ethnicity, 30th June 2012

Ethnic group	West Somerset	
	No.	**%**
Refused	7	0.6
Unavailable	20	1.6
Asian or Asian British Bangladeshi	1	0.1
Asian or Asian British Chinese	1	0.1
Asian or Asian British Indian	1	0.1
Black or Black British Caribbean	2	0.2
Mixed White & Asian	5	0.4
Mixed White & Black Caribbean	2	0.2
Other Asian or Asian British background	2	0.2
Other Gypsy/Romany/Irish Traveller	2	0.2
Any other group	5	0.4
Other Ethnic Group	2	0.2
White English	1,119	91.7
White Irish	4	0.3
White Other British	35	2.9
Other white background	12	1.0
Totals	1,220	**100%**

(Source: Homefinder Somerset data)

Key findings:

- Data is not available for just over 2% of applicants;
- 96% of applicants were from White ethnic groups which compares with a White population of 98% in 2011; and
- only 23 people registering selected any other ethnic group.

Who is being housed in the intermediate housing sector?

4.13 This section considers who is being housed in the intermediate housing sector in the area. Data is available for 10 sales, typically of shared ownership or HomeBuy properties for 2006-07, 2009-10 and 2011-12. The first dimension considered is the type of households being housed then their net weekly incomes.

Table 4.9: sales by type of household, April-March, 2006-07, 2009-10 and 2011-12

Household type	Numbers
Single adult	3
Multi-adult no children (typically couples)	3
Multi-adult + children (families)	4
Lone parents	0
Older people (not included above)	0
Total	10

(Source: Core)

Key findings:

- The data available is limited but identifies that shared ownership housing is working more effectively for single adults, couples and multi-adult households with. This almost certainly reflects the type of housing provided.
- Despite the potential for ‘downsizing’ and the existence of a designated scheme, no older people were housed in this way.

Incomes of purchasers

4.14 Incomes data is recorded for single income purchasers (Person 1) or joint purchasers (Person 1 and Person 2) as appropriate. The following table reviews average gross annual income by type of households, and includes joint income purchasers. This may be all or partly from benefits/pensions but not including child benefit, housing benefit, council tax benefit or interest from savings. The incomes distribution is compared with median gross annual incomes from full-time employment recorded in 2011 by the Annual Survey of Hours and Employment.

Table 4.10: sales by average gross annual income of Person 1 and 2 combined, April-March, 2006-07, 2009-10 and 2011-12, and median gross annual incomes from full-time employment, 2012

Income band	Numbers
Under £7.5k	0
£7.5-9,999	1
£10-13,999	1
£14-17,999	1
£18-21,999	3
£22-29,999	3
£30-39,999	1
£40k+	0
Total	10
Median full-time gross earnings 2012	£17,612

(Source: Core and ASHE 2012)

Key findings:

- 60% of purchasers earned £18-29,999 which is in excess of median gross incomes from full-time work of £17,612 in West Somerset. However, as explained in Chapter 2 above, ASHE data relates to earnings from employment only and the relatively high proportion of self-employed people (estimated to be in the region of 27%) are likely to have lower earnings in the region of £12,830 per annum.

4.15 The following table reviews sales by previous tenure, data is provided for person 1 only.

Table 4.11: sales by previous tenure of Person 1, April-March, 2006-07, 2009-10 and 2011-12

Previous tenure	Numbers
Social rented	2
Private rented	4
Tied home/renting with job	0
Owning/buying	0
Family/friends	3
Temporary	0
Other	1
Total	10

(Source: Core)

Key findings:

- 40% of purchasers were previously renting privately and 30% living with family or friends. It can be assumed that such households were renting whilst saving money for their first purchase; and

- only 2 people were previously renting from a local authority/housing association which implies that generally such households are unable to make the step to affording shared ownership. This is unsurprising in view of the low incomes recorded for social tenants.

Determining the affordability of housing

4.16 There are two main approaches to determining the affordability housing:

1. The residual income approach which calculates how much income is left over for housing after relevant living expenses have been taken into account for different household types. If there is insufficient income left for housing costs, a household has an affordability problem. This approach requires calculations to be made for a very wide variety of household types and income levels and is more appropriate for middle to higher income groups.

2. The second approach involves setting an affordability threshold or benchmark which identifies the maximum proportion of a household's gross or net income which should be spent on housing costs. This is a straightforward approach which is considered more appropriate for lower to middle income groups.

4.17 In both cases, particular mention should be made of the disadvantaged position of families with children as their additional living expenses constrain what they can afford to spend on housing, including their ability to borrow to purchase market housing. An assessment of this can be obtained by consulting Equivalence Scales, see Table 2, University of York, Social Policy Research Unit's Minimum Income Standards paper:

http://www.crsp.ac.uk/MIS/downloads/launch/equivalence_WP3_20june08.pdf

4.18 In view of the complexity of developing a generic model capable of calculating residual incomes, an affordability threshold approach has been applied but there is no consensus over the affordability level to be adopted. For example:

- The National Housing Federation (NHF), the representative body for housing associations, had previously recommended rent levels were affordable when they were 25% or less of gross household income for new tenant households in work, equivalent to 34% of net income.

- The Homes and Communities Agency (HCA), the funding body for new affordable housing, recommended that 30 - 45% of net income is the acceptable range for housing costs. (Capital Funding Guide, HCA, 2011), please see: http://cfg.homesandcommunities.co.uk/

- The CLG whose assessment of affordability for intermediate housing is that a household should use a maximum of 25% of gross income to pay for their mortgage and rent (Strategic Housing Market Assessment Practice Guide, 2007), please see: http://www.communities.gov.uk/publications/planningandbuilding/strategichousingmarket

- The Mayor of London: the London Plan states that for products where a rent is paid, the annual housing costs, including rent and service charge, should be no greater than 40% of net household income (London Plan Annual Monitoring Report, February 2011), please see: http://www.london.gov.uk/priorities/planning/research-reports/annual-monitoring-reports

- Tenant referencing agencies provide affordability checks for private landlords. Based on experience and historic levels of rent defaults the standard level of rent to gross income acceptable to private landlords is 40%.

- A major review of data sources undertaken in 2010 concluded that a household can be considered able to afford market renting where the rent payable is up to 25 per cent of their gross household income. The 'rent payable' figure is defined as the entire rent due, even if it is partially or entirely met by housing benefit. Other housing-related costs, such as council tax and utility bills should not be included (Measuring Housing Affordability: A Review of Data Sources, CCHPR, 2010), please see: http://www.communities.gov.uk/documents/507390/pdf/1098230.pdf

- Finally, 'the 30/40 rule' has been developed including Australia which takes 30% of gross income committed to housing costs as the benchmark and applies this either to all households or to the lower 40% of households by income.

4.19 Based on the above, and Housing Vision's experience in housing market and affordability assessment, a baseline affordability threshold has been applied of 25% of gross household income which is equivalent to 34% of net household income where net income is assumed to constitute 74% of gross. Applying a 25% Affordability Threshold (the percentage of household income that can sustainably be spent on housing costs), the affordability of all property types and sizes and can be modelled for all tenures.

4.20 The West Somerset 'Affordability and Housing Options' Toolkit designed by Housing Vision has been used to assess affordability using:

- gross household income levels determined by CACI PayCheck profiles;

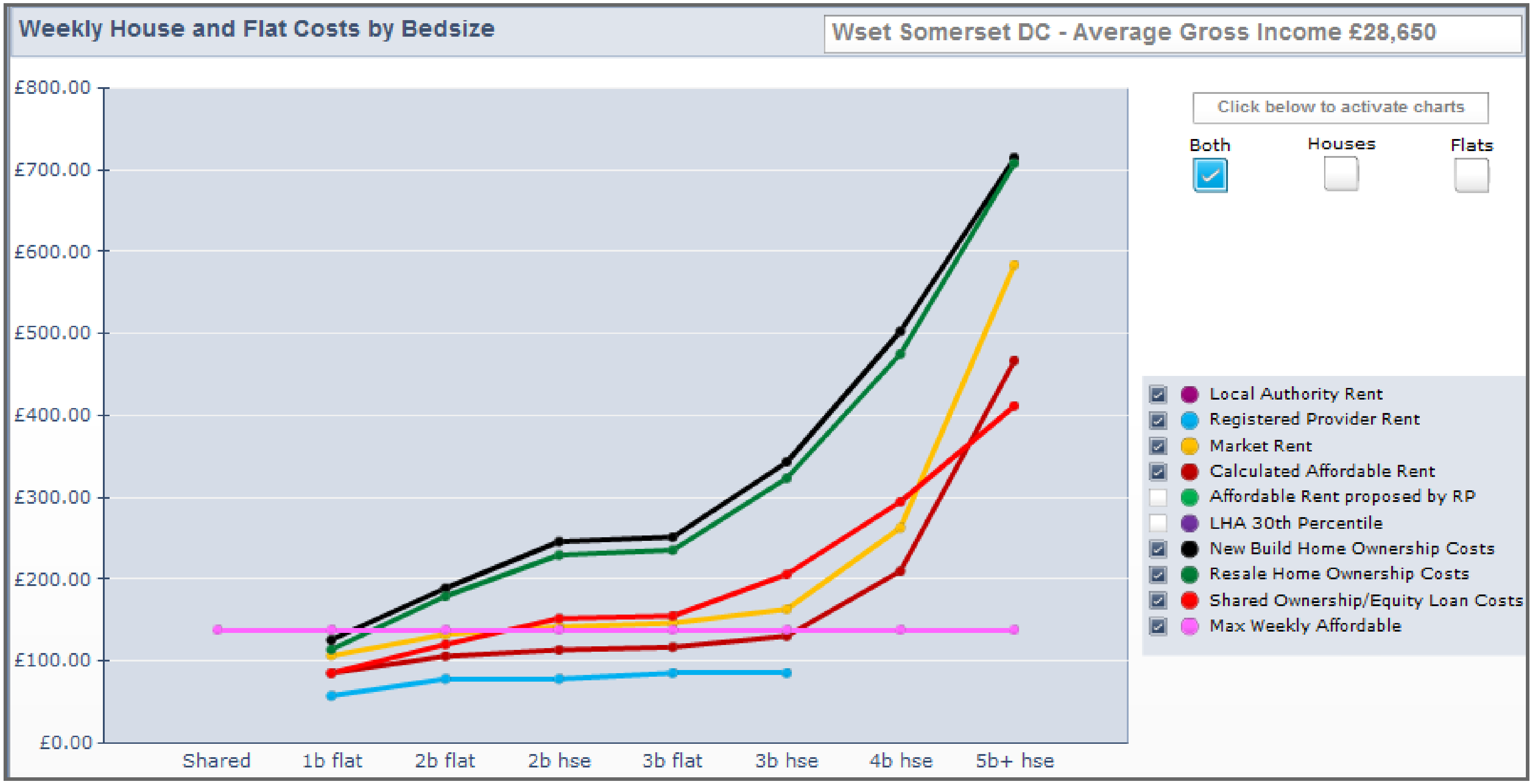
- rents and sales prices by property type and bed size;

- for shared ownership/equity loan, the share purchased, deposit, interest rate and period, the rental element and service charge; and

- for home ownership, the deposit, loan interest rate and period.

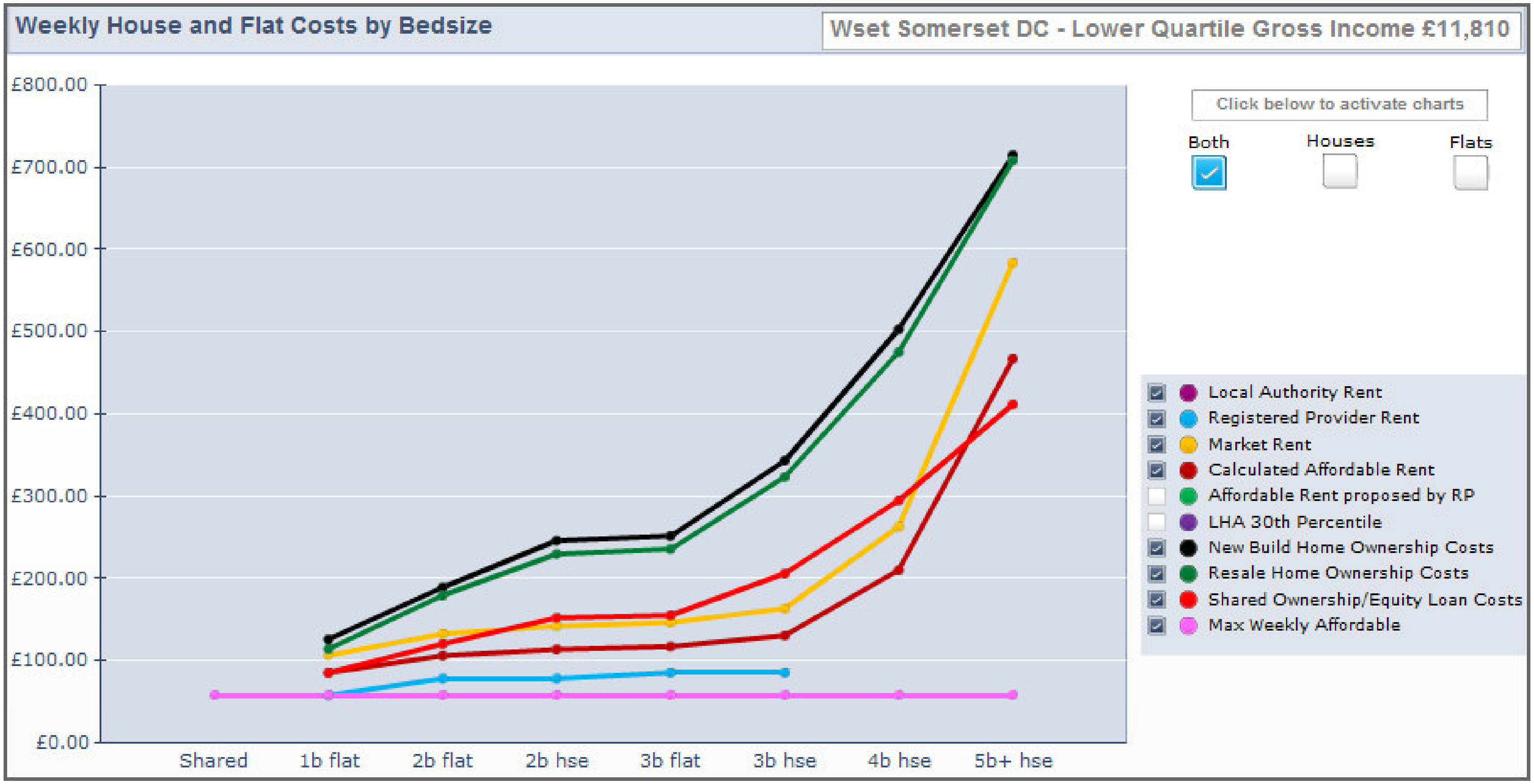
4.21 The following charts are taken from the Toolkit and demonstrate the extent to which housing options in West Somerset are affordable to those in receipt of either average or lower quartile gross incomes. Only those properties below the maximum weekly affordable threshold shown (in pink) are affordable, no account has been taken of Housing Benefit support.

Fig 4.1: the affordability of housing in West Somerset for households in receipt of the average gross household income of £28,650



(Source: West Somerset Affordability and Housing Options Toolkit)

Fig 4.2: the affordability of housing in West Somerset for households in receipt of lower quartile gross household incomes of £11,810



(Source: West Somerset Affordability and Housing Options Toolkit)

Key findings:

- For those in receipt of average incomes without housing support, only the following properties are affordable:

    - social rent: 1 to 3 bed flats and houses;
    - Affordable Rent: 1 to 3 bed flats and houses;
    - market rent: 1 to 2 bed flats;
    - shared ownership: 1 to 2 bed flats;
    - re-sale home ownership: 1 bed flats; and
    - new-build home ownership: 1 bed flats.

- For those in receipt of lower quartile incomes only 1 bed social rented flats properties are affordable without housing support.

The impact of housing and welfare reforms

4.22 The government's housing and welfare reform will have a profound effect on access to housing in the affordable and private rented sectors. Assessments are currently underway in both districts, including by registered providers, to assess their precise impact but their potential extent can be determined on the basis of the numbers of claimants in receipt of relevant benefits. The subsequent table summarises the main reforms of relevance and identifies the sector, the type of people affected and their likely impact.

4.23 In relation to Housing Benefit, at August 2012 DWP Statistics recorded that:

- there were 2,950 claimants in West Somerset or 19% of all households, 1,710 in the social rented sector and 1,240 in the private rented sector; and

- over the year 2011-2012, Core recorded that 54% of all new tenants were eligible for Housing Benefit.

4.24 In relation to Council Tax Benefit at August 2012:

- there were 3,600 claimants or 23% of all households.

4.25 There were 2,580 claimants in receipt of both Housing Benefit and Council Tax benefits or 17% of all households.

Table 4.12: the impact of current and proposed housing and welfare reforms

Date	Change	Housing sector	People affected	Impact
01.04.11	Reduction in Local Housing Allowance (LHA) rates from 50th to the 30th percentile. Abolition of the higher rate for 5 bed or larger properties.	Private rented	All in receipt of LHA	Reduction in the number of eligible properties – increased demand for lower cost properties.
01.01.12	LHA shared room rate for under 25s extended to 25-34 year olds	Private rented	Under 35s	Reduction in the size of eligible properties – greater demand for shared housing.
01.04.13	Council Tax (CT) Benefit abolished and replaced with a localised scheme funded from a fixed non-ring fenced grant payment.	All	Working age applicants	Unknown. The replacement scheme will be at the discretion of local authorities. Overall, CT benefit expenditure is to be reduced by 10%.
01.04.13	LHA rates to be uplifted on the basis of Consumer Price Index (CPI) rather than by reference to local rents.	Private rented	All in receipt of LHA	If rents increase at a rate above CPI then there will be a reduction in the number of eligible properties.
2012-13	LHA rates will be frozen (rates will be based on March 2012 figures)	Private rented	All in receipt of LHA	If rents increase at all, then there will be a reduction in the number of eligible properties.
01.04.13	Housing Benefit (HB) restrictions - Social Housing - Working Age. Size restrictions will be introduced for working age tenants on HB in the social sector. Customers who have one spare bedroom will experience a 14% reduction in the rent allowed for HB. Those with two or more spare bedrooms will see a 25% reduction in the rent allowed for calculating HB.	Social rented	Working age applicants	Greater pressure is likely to be placed on the demand for smaller homes.

Date	Change	Housing sector	People affected	Impact
01.04.13	Household Benefit Cap. There will be a total maximum amount that can be claimed in all benefits for working age non-working families. It is proposed that the threshold will be set at the median net earnings for working age households: £500 per week (£26,000 p.a.) for a couple and lone parent households A lower rate of £350 per week will apply for single adult households.	Social rented	Working age applicants	This is likely to have the greatest impact on larger families living in larger homes which attract the highest rentals.
01.04.13	Community Care Grants and Crisis Loans for living expenses (Part of the Discretionary Social Fund) will be abolished and replaced with a locally-based non-ring fenced provision. There will be no new duties on local authorities to provide the new assistance.	All	All in receipt of emergency loans	Unknown, emergency provision will be at the discretion of local authorities.
2013	Introduction of Universal Credit (UC). The aim of UC is to simplify the benefits system by bringing together a range of working-age benefits into a single streamlined payment. Payments will go to one member of the household, although it will be the whole household that claims. Payments will be calendar monthly and paid in arrears. Payments to go direct to the tenant unless vulnerable.	All	All in receipt of • Income related Job Seeker's Allowance • Income related Employment & Support Allowance • Income Support • Child Tax Credits • Working Tax Credits • Housing Benefit	Unknown.

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Analysis and conclusions

What is the current pattern of need and demand for social rented housing?

4.26 Homefinder Somerset data provides comprehensive data identifying patterns and trends in the need for housing. At July 2012, there were 1,220 registered applicants, 55% of whom were in the Gold high housing need band.

4.27 55% of people were registered for a 1 bed property and 29% for a 2 bed property. Other than matching requirement or preference, there may be a number of reasons why applicants register for smaller properties, including the greater likelihood of obtaining a tenancy. Care must also be taken in interpreting the figure of only 13% registering for a 3 bed and 4% for a larger home as indicative of low need or lesser preference when lack of supply may act as a disincentive to registering for homes of this size.

4.28 From a peak of 129 households in 2002-03, homeless acceptances fell steadily to 2009-10 but the trend reversed slightly in 2010-11 which is likely to be associated with the impact of the economic recession and associated increases in repossessions and redundancy etc. It is anticipated that this trend is likely to continue.

4.29 Just over 70 applicants identified special requirements, mostly for sheltered or adapted accommodation. The availability of appropriate accommodation could free up other stock, especially larger family dwellings, to meet wider housing needs.

4.30 Ratios of applicants to supply varied from 11:1 for bedsit, 1 or 2 bed properties to 103:1 for 4 bed or larger properties which is indicative of a need to supply mismatch.

4.31 The seriousness of the overall mismatch between supply, need and demand in West Somerset is evident from estimating the time required to house all those on the waiting list. On the basis of current turnover, it would take a minimum of 11 years to clear the backlog of demand for any property type.

4.32 An average of almost 17 bids was made for each letting, the strongest demand was for houses and 2-3 bed properties and the lowest for maisonettes, studios and 1 bed homes.

4.33 Data on lead applicants by household type identified that 38% consisted of 1 person; 30% of 2 people; 24% of 3 or 4 people and 8% of 5 people or more. In terms of age, 28% of lead applicants were aged 17-29 – the largest band; 19% 30-39; 29% 40-59 and 34% were aged 60 or above.

4.34 In 2010-11, 96% of registrations were to White applicants which compares with a White population of 99% in 2011. Only 23 applicants were from to other ethnic groups.

What is the current pattern of need and demand for intermediate housing?

4.35 Based on very limited sales data from 2006 to 2012, and almost certainly reflecting the type of stock available, the intermediate sector was most successful in housing single people, couples and two parent families. No lone parents or older people were housed in this sector.

4.36 60% of purchasers earned £18-29,999 - which is in excess of median gross incomes from full-time work of £17,612.

4.37 This very limited information suggests that the intermediate housing sector is more successful in housing people who were previously renting privately or living with family or friends. Only 2 people were previously renting from a local authority or housing association, indicating a lack of access to this type of product by that applicant.

What is the pattern of affordability?

4.38 Applying an affordability threshold of 25% of gross equivalent to 34% of net household income, most housing and especially houses, are unaffordable for those on average incomes and almost all housing is unaffordable for those on lower quartile incomes. In the market sector, for those on average incomes, the only affordable properties are Affordable Rented 1 bed flats; 1-2 bed market rented and shared ownership flats; and re-sale and new-build ownership 1 bed flats.

The impact of housing and welfare reforms

4.39 Whilst the precise impact is still to be determined, the government's housing and welfare reform will have a profound effect on access to housing in the affordable and private rented sectors, limiting choice and households to housing by bedroom requirement. Those most affected are of working age, especially young single people under 35, and in receipt of Council Tax or Housing Benefit. Some indication of the potential extent of the impact of the reforms can be gauged from the number of people claiming Housing Benefit, there are currently almost 3,000 claimants, 1,710 in the social sector and over 1,240 in the private rented sector; and there were 3,600 claimants for Council Tax Benefit, almost one quarter of all households.

5. Determining Future Housing Requirements

Introduction

5.1 This chapter explains the approach adopted in determining future housing requirements for West Somerset, the detailed requirements are set out by tenure and bed size in the subsequent chapter providing Conclusions and Recommendations. The operation of housing markets is like a complex version of 'musical chairs' as people move between homes and sectors within the limits of the supply available. This process can be likened to a 'zero sum' game whereby a home becoming available through a household dissolving or moving home is matched by a home taken elsewhere by a forming or moving household. However, it is rare for housing markets to be in perfect balance such that all moves are internal to the market and static supply meets fixed demand. In the real world, populations change, increase or decrease; people move in and out of areas - not always in balance; some areas may be more or less popular and the 'fit' between people's requirements and the housing available may be poor, homes may be too large or too small, or just too expensive.

5.2 These are the dynamics against which future housing requirements are determined. All households have to fit around the housing available, but where projections indicate that numbers are set to grow, additional housing provision needs to be planned for on the basis of household type, size, age and income, all of which will shape their requirements.

Confidence and certainty in determining housing requirements

5.3 Whilst 2011 Census data was available at the time of completion of this Update, 2008-based household projections had yet to be revised to take account of its findings.

5.4 More importantly, we are experiencing a unique coincidence of economic and financial problems, the outcome of which is unknown. Turnover and home moves have reduced dramatically, although property prices have not fallen as far as predicted, and there is growing evidence of the growth of two or even three generation households which would impact on housing requirements. The consequences of the economic and financial situation for households, housing markets and housing projections are uncertain.

5.5 In summary, we can be <u>confident</u> that we have the evidence to demonstrate that household numbers and housing requirements will grow, but in current circumstances, we cannot be <u>certain</u> of the precise pattern of growth and its housing consequences.

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Applying the West Somerset Housing Requirements Toolkit

5.6 This Update adopts a new approach to determining those requirements. It moves away from static or scenario-based analyses by applying an interactive Housing Requirements Toolkit developed by Housing Vision to identify the requirements of new or additional households and enable them to be constantly modelled and monitored. The structure of the Toolkit is explained below, and guidance on its application is available through a separate User Manual.

5.7 The key principles are as follows:

- The Toolkit applies local data for household projections, incomes and housing costs to identify the basic housing requirements of households, i.e., the bedrooms required by size and composition of household; it does not assume the provision of 'spare' bedrooms. This is not to advocate the minimal provision of bedrooms and the provision of additional bedrooms can be modelled as preferred.

- the Toolkit allows any housing backlog from any sector to be included and its reduction to be modelled over any policy period;

- it estimates levels of under-occupation in older (65+) households and projects potential requirements for specialised housing for all older and projected additional older households.

The structure of the toolkit

5.8 The toolkit consists of 5 sections, each of which represents a stage in assessing the housing required to meet household growth as follows:

- **Household projections**: for any two years, this identifies the number of households by type and age, and changes between the start and finish years chosen in terms of absolute and proportionate change. A final table on the Households page identifies whether there is growth (red) or decline (green) in any household type and the outcome in terms of projected growth in households by type and age over the selected period.

- **Housing supply**: this enables constant monitoring of the local housing stock and housing supply as the context for understanding future housing requirements.

- **Housing costs and affordability**: this determines the cost of housing of different types, bedsizes and tenures, the income required to afford housing of different types and applies an affordability threshold to determine the proportion of households who are able to afford housing by tenure. Further detail of the approach to determining affordability has been provided at para 4.39 above.

- **Housing requirements**: the future housing requirements arising from new or additional households by bed size and tenure are derived by combining household projections with cost and affordability data. There is also the facility to assess the impact of a backlog in the requirement for affordable housing and of previous under-supply in any tenure.

- **Housing requirements by age**: separate consideration is given to the special housing requirements of all and additional older households in the context of the extent of under-occupation.

5.9 The toolkit is based on two types of data, fixed and variable.

- The fixed data will be constant until it is re-issued, for example, household projections and CACI incomes data although both the household projections and household incomes can be varied by +/- 100% using sliders within the Toolkit.

- The variable data can be input and changed by the user at any time and includes the start and finish years for projections, housing costs, housing supply; bedsize by household type, any affordable housing backlog and estimated levels of under-occupation in 65+ households.

5.10 The following sections explain the stages in assessing the housing requirements of new or additional households in West Somerset.

Components of household projections

5.11 Household projections take account of the effects of a number of factors:

- 'natural change': underpinned by the relationship between births and deaths, and which results in the formation of new households and the ending of existing ones;
- changes affecting existing households: for example relationship breakdown and movements through the life cycle; and finally
- in and out migration: and the relationship between them.

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5.12 The CLG methodology for estimating household projections takes account of these factors which are based on the following 17 household types:

1. One person male
2. One person female
3. Other households
4. Couple no children
5. Couple 1 child
6. Lone parent 1 child
7. Couple 2 children
8. Couple and 1 or more adults no children
9. Lone parent 2 children
10. Couple and 1 or more adults 1 child
11. Lone parent 1 or more adults 1 child
12. Couple 3+ children
13. Couple and 1 or more adults 2 children
14. Lone parent 3+ children
15. Lone parent 1 or more adults 2 children
16. Couple and 1 or more adults 3+ children
17. Lone parent 1 or more adults 3+ children

5.13 The differences in many of these household types are very minor, and to make the process more manageable, these have been combined into 7 which match their bedsize/person requirements as set out in the following table. Where there are 2 or more children in a household, the bedroom requirement will be determined according to their age and sex. It is not possible to predict these with accuracy and therefore the minimum bedroom requirement has been assumed in all cases.

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Table 5.1: derived household types and associated minimum bedsize

Derived household types	Household type	Bedsize	Persons	Minimum Bedsize
One person	One person male	0/1	1	1
	One person female	0/1	1	
	Other households	0/1	1	
Couple no children	Couple no children	1	2	1
Couple/lone parent and 1 child	Couple 1 child	2	3	2
	Lone parent 1 child	2	2	
Couple/lone parent and 2 children/couple and 1 or more adults no children	Couple 2 children	2/3	4	2
	Couple and 1 or more adults no children	2/3	3/4	
	Lone parent 2 children	2/3	3/4	
Couple/lone parent and 1 or more adults and 1 child	Couple and 1 or more adults 1 child	3	4/5	3
	Lone parent and 1 or more adults 1 child	3	3/4	
Couple/lone parent and 3+ children/ couple/lone parent and 1 or more adults and 2 children	Couple 3+ children	3/4	5/6	3
	Couple and 1 or more adults and 2 children	3/4	5/6	3
	Lone parent and 3+ children	3/4	4/5	
	Lone parent 1 or more adults 2 children	3/4	4/5	
Couple/lone parent and 1 or more adults 3+ children	Couple and 1 or more adults 3+ children	4/5	6/7	4
	Lone parent 1 or more adults 3+ children	4/5	5/6	

(Source: Housing Vision)

5.14 As a result of this exercise, the 7 derived household types applied in projecting housing requirements are:

- One person

- Couple no children

- Couple/lone parent and 1 child
- Couple/lone parent and 2 children/couple and 1 or more adults no children
- Couple/lone parent and 1 or more adults and 1 child
- Couple/lone parent and 3+ children/ couple/lone parent and 1 or more adults and 2 children
- Couple/lone parent and 1 or more adults 3+ children

Housing supply

5.15 This is the second section of the Toolkit and deals with the housing stock and housing supply. This page identifies the profile of the housing stock by bedsize and tenure and enables this to be continuously updated through stock gains and losses. Please note that shared accommodation can be an entire house, flat or converted building or any of the following:

- bedsits
- shared houses
- households with a lodger
- purpose-built HMOs
- hostels
- guesthouses - if rented out of season
- bed and breakfasts providing accommodation for homeless people
- some types of self-contained flats converted from houses

5.16 Supply information provides a context for understanding the type of housing becoming available for all households, including additional households, they do not inform the modelling of future housing requirements. The annual supply of housing can be modelled by applying a turnover rate, which will vary over time according to supply: demand issues; financial and economic considerations. Due to uncertainty over these factors, it is not possible to project stock turnover with precision but set out below is a list of possible approaches for determining turnover rates:

- For the home ownership sector: turnover is based on the number of properties recorded as sold by the Land Registry in the previous 12 months as a proportion of all owner occupied homes.

- For the shared ownership/equity sector: the home ownership turnover rate has been applied, or recognising the relatively low levels of staircasing to full ownership, a slightly lower rate can be applied.

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- For the private rented sector: the turnover rate is based on the estimate in the English Housing Survey 2011-12 that 32% of private

renters had lived in their property for less than one year. A slightly more cautious turnover rate of 30% has been applied here.

- For the social rented sector: turnover is based on the number of properties advertised in the 42 months from 1st January 2009 annualised as a proportion of all stock.

Housing costs and affordability

5.17 Using the approach described at para 4.39 above, the Toolkit assesses the affordability of a typical entry level property, the default setting is a 2 bed house which is especially relevant to meeting the typical requirements of additional households, the majority of which are small, and can be considered an 'average' housing type. The cost of accessing this property for all tenures (local authority renting to new build home ownership and including Affordable Rent) is compared against the maximum housing costs available per household. The maximum costs affordable are based on the affordability threshold selected which is in turn determined in relation to the CACI PayCheck household incomes provided. The Toolkit calculates the household incomes required to access each tenure for an archetype 2 bed house and the absolute numbers and percentages of the households on the CACI profile that can afford each tenure. A column at the end of the housing costs inputs section of the Toolkit allows these costs to be changed so that they can reflect other bedsizes and property types as required, for example a 2 bed flat or a 5 bed house.

5.18 All tenures have been included in this Update in terms of a hierarchy of affordability. Affordable Rent has been treated as a full cost market product though access to Housing Benefit may make it more accessible to lower income groups. It is not possible to assess with any accuracy how many households on the CACI PayCheck Profile will be in receipt of sufficient Housing Benefit to be able to afford Affordable Rent but it does indicate the level of household income required to access an Affordable Rented product. Private rent has been separately identified as it now constitutes a major element of housing supply, though in terms of new housing required, this is likely to be provided by the home ownership sector then transferred to the private rental sector.

5.19 The Toolkit identifies the household income levels required to access each tenure at January 2013 and the proportion of households that can afford them. The following table lists the outcome and provides a hierarchy of affordability from those who can only afford social rented housing to the cumulative percentages who can afford other options.

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Table 5.2: affordability by sector, proportion of households who can afford each sector, January 2013

Sector	Proportion of households
Social rent only	52.0%
Affordable Rent	10.0%
Shared equity/ownership	17.5%
Private rent	3.0%
Owner occupier	17.5%

(Source: Housing Vision, West Somerset Housing Requirements Toolkit)

Key findings:

- The implication of this assessment is that there is:
  - an affordable housing requirement (social rent only) of 52%;
  - an intermediate housing requirement (shared equity/ownership and Affordable Rent) of 27.5%; and
  - a market sector requirement (owner occupier and private rent) of 20.5%.

Determining housing requirements at the district level

5.20 Before identifying the housing required over the period 2011-2031, a number of factors need to be considered and assumptions made concerning bedsize, backlog and matching surpluses against deficits of housing required.

Additional bedrooms

5.21 The Toolkit identifies the requirements of additional households by number of bedrooms but it is not possible to determine this with precision for households with children as their requirements will be determined by the age and sex of the individual children. No assumptions have been applied in modelling concerning the provision of a spare bedroom which is additional to that required to meet a household's minimum requirement. However, this is not to advocate building housing to the minimum requirement. It is more sustainable to build housing with a spare bedroom, for example to give young families the opportunity to expand or enable older people to have a carer to stay. This is likely to be decided by providers for market housing but, as Housing Benefit is now only available for the number of bedrooms required, the provision of extra bedrooms is not an option in the social sector.

Housing backlog

5.22 The Toolkit can also take account of any backlog or surplus of housing completions in any sector though none has been identified in this case.

Matching deficits and surpluses of housing required

5.23 The final stage is to identify whether there is a deficit or surplus of housing of different bedsizes and tenures. Surpluses of shared units are set off against the requirement for 1 bed housing in the modelling. Where they occur, surpluses of housing can be set against shortages of lower sized properties as follows:

- Surpluses of 1 bed units can be set against the requirement for shared units;
- Surpluses of 2 bed units can be set against the requirement for 1 bed units;
- Surpluses of 3 bed units can be set against the requirement for 2 bed units;
- Surpluses of 4 bed units can be set against the requirement for 3 bed units.
- Surpluses of shared units have not been set against any requirement as their variable pattern including purpose-built to sub-divided accommodation makes generalisation difficult.

Gross housing requirements by tenure and bedsize

5.24 The following table identifies gross housing requirements by tenure and bedsize for the period 2011-2031.

Table 5.3: projected gross housing requirements for West Somerset 2011-2031, without backlog

Tenure	Sector	Shared	1 bed	2 bed	3 bed	4+ bed	Total No.	Total %
Affordable	Social Rent	-57	1,353	74	-173	-4	1,193	52.16%
	Affordable Rent	-11	256	14	-33	-1	226	9.86%
Intermediate	Shared Ownership	-19	456	25	-58	-1	402	17.57%
Market	Private Rent	9	74	4	-9	0	65	2.84%
	Owner Occupier	-19	456	25	-58	-1	402	17.57%
Total no.	All sectors	-110	2,594	142	-331	-8	2,288	
Total %	All sectors	-4.8%	113.4%	6.2%	-14.5%	-0.3%		

(Source: Housing Vision, West Somerset Housing Requirements Toolkit)

Gross housing requirements by age and bedsize

5.25 The Housing Requirements Toolkit also enables requirements to be expressed by age band and this identifies that most additional requirement will arise from households aged 65+ as identified in the following tables for the period 2011-2031.

Table 5.4: projected gross housing requirements by age and bedsize for West Somerset, 2011-2031, without backlog

	Age								
Bedsize	**15-24**	**25-34**	**35-44**	**45-54**	**55-64**	**65-74**	**75-84**	**85+**	**Totals**
Shared	-8	28	-15	-41	-31	-26	-29	12	-110
1 bed	-17	-41	39	-115	3	786	1,102	837	2,594
2 bed	20	4	50	-2	14	16	18	23	142
3 bed	0	8	-68	-138	-63	-79	-8	17	-331
4 bed +	1	-21	3	-7	2	1	12	0	-8
Totals	4	-51	24	-262	-43	725	1,125	877	2,288

(Source: Housing Vision, West Somerset Housing Requirements Toolkit)

Key findings:

- Over 80% of the additional housing requirement will arise from growth in the number of older households over the next 20 years.

5.26 However, that most of the additional requirement for housing will arise from older households has major implications for meeting future housing requirements in West Somerset. Although some growth in older households may be attributed to net migration, most is the result of more older people living longer who are already resident in the area. Most of these households will already be housed, typically in family-sized accommodation. More robust data determining the extent to which this is the case will be available when 2011 Census data is released, but Census data on under-occupation provides some indication of the extent to which older households live in family housing. In West Somerset, 62.9% of households aged 65+ were under-occupying in 2001. This implies that in the region of 63% of older people are currently living in family housing, a proportion which will apply to those for whom additional - and smaller - housing is projected to be required. If additional older households do not downsize to smaller homes, replacement family housing will be required to maintain existing levels of supply.

5.27 The number of older households able and/or willing to downsize is not known, but, on the basis of studies of under-occupation and housing need, it is estimated that this does not currently exceed 10%. Applying estimates of under-occupation, as much as 57% (90% of 63%) of the requirement for housing for older people may need to be provided as family housing to replace supply 'blocked' by older people who do not downsize. Whilst the proportion willing to downsize may change, the estimate that 90% of underoccupying older households will not downsize has been applied in modelling the districts' future housing requirement with the effect that replacement 3 bed housing will be required to compensate for the loss of supply.

5.28 Taking all the above considerations into account, the projected housing required by bedsize and tenure for the period 2011-2031 is set out in detail at 6.10 under Conclusions and Recommendations.

Determining special housing requirements

The housing requirements of older households

5.29 In view of the significance of the projected growth in older households, the Toolkit enables projections to be made of the numbers of pensioner households requiring designated, sheltered or extra-care housing. Following extensive research undertaken by Housing Vision, these have been calculated using the following methodology:

- Stage 1: Needs Groups established within the wider older person's population;
- Stage 2: Need adjusted according to local conditions;
- Stage 3: housing options linked to Needs Groups;
- Stage 4: estimate of the proportion within each Needs Group that in any one year is likely to want to make use of these different options; and
- Stage 5: the need for housing translated into the number of units of service required.

5.30 The requirement for 3 types of specialised housing has been determined:

- Designated: housing, such as private sector retirement apartments, which includes the following features:
    - fully adapted accommodation;
    - integrated alarm with staff response when required;
    - facilitation of mutual support; and
    - opportunities for social activities.

- Sheltered or Supported: as Designated Housing above but providing personal support to residents as required;

- Extra Care: housing which crosses the boundary between high-level support needs and high-level care needs, with a larger proportion in the latter category.

5.31 The estimated number of under-occupying pensioner households and the specialised housing required between 2011 and 2031 have been detailed at 6.13 under Conclusions and Recommendations below.

HOUSING VISION

6. The potential impact on the housing market of the construction of Hinkley Point C

6.1 This section provides an overview of:

- EDF's plans and proposals in relation to accommodating those employed in the construction of Hinkley Point C. The following sources have been consulted:

  Accommodation Strategy (Other Documentation Docs Ref. 8.13)

  http://infrastructure.planningportal.gov.uk/wp-content/ipc/uploads/projects/EN010001/2.%20Post-Submission/Application%20Documents/Other%20Documents/8.13%20Accomodation%20Strategy/8.13%20Accomodation%20Strategy.pdf

  Economic Strategy (Other Documentation Docs Ref. 8.16)

  http://infrastructure.planningportal.gov.uk/wp-content/ipc/uploads/projects/EN010001/2.%20Post-Submission/Application%20Documents/Other%20Documents/8.16%20Economic%20Strategy/8.16%20Economic%20Strategy.pdf

  Transport Appraisal

  http://hinkleypoint.edfenergyconsultation.info/Preferred_Proposal_Documents/Transport%20Appraisal/13_Transport%20Appraisal.pdf

- An assessment of the impact on the housing market using GIS mapping to identify the geography of supply and demand;
- The views of estate and lettings agents in West Somerset; and
- Conclusions.

EDF's plans

6.1 The Economic Strategy, October 2011, outlines EDF's employment plans for Hinkley Point C (HPC). The focus is mostly on the 'Somerset' economy, but reference is also made to a wider area which overlaps Bristol, Avon, and Devon. This wider area forms a 90-minute travel zone, called the 'Construction Daily Commuting Zone (CDCZ), from which EDF intends to recruit the home-based workforce. The home-based workforce is anticipated to comprise existing local people in employment, with a specific focus on seeking to up skill those who are unemployed, economically inactive or would otherwise work in casual/seasonal work.

6.2 Construction of HPC is to require 50 million hours of work, equating to 20,000-25,000 person-years of employment. The average time on site per job is anticipated to be around 1 year, so there are to be an expected 2,800 jobs per year over 9 years.

6.3 Approximately 20% of the construction jobs created are expected to go to 'local' (Somerset) people, and these will largely be a mixture of construction and administrative roles.

6.4 It is estimated that a much higher percentage of jobs created will be taken up by 'home-based' workers that is those living within the wider CDCZ:

- Total jobs in the calculation used are 28,770 (which is higher than the 2,800 per year over 9 years referenced above).
- Of these, 6,025 are intended to be taken up by people living within the 3 Districts (21%).
- A further 4,906 will be workers from the CDCZ, meaning that 38.9% of the construction workforce will be 'home-based'.
- The remainder of the workforce will be non-home-based

6.5 Non-home-based workers coming into the area specifically for employment at HPC are expected to reside within a smaller 60-minute commuting zone.

6.6 Once completed, HPC is expected to employ around 900 people (with an additional 1,000 during planned outages), with indirect employment for a further 360 people.

EDF's Accommodation Strategy

6.7 This section focuses on the detail contained within the October 2011 Accommodation Strategy and associated technical appendices.

6.8 At the peak of construction, a workforce of 5,600 (in 2016) is envisaged. It is estimated that two thirds of this workforce will require accommodation, which is 3,700 people, the non-home based workforce.

6.9 The approach planned is to use a mixture of existing accommodation (including tourist), along with addition, purpose-built campus's, on-site

HOUSING VISION

and at Bridgwater. EDF anticipate that the vast majority of the non-home-based workforce will be male and aged 20-49.

6.10 According to the Accommodation Strategy at para 2.2.2, some, mainly professional and project management staff, will move to the area for a significant length of time (several years or for the duration of construction), and in the case of future operational staff on a potentially permanent basis. These individuals, equating to around 500 workers, are more likely to seek permanent housing in the local area and to bring their families with them.

6.11 EDF estimates the following split between the types of accommodation proposed with bed spaces indicated:

• Campus	1,450
• Owner occupation	500
• Tourist	600
• Private rented	750
• Latent accommodation	400
• Total	3,600

6.12 EDF have applied a 'Gravity Model', which is based on typical travel times for construction workers in the South West, and this assumes that people already living in the area will be willing to travel up to 90 minutes each way to work. For workers who move into the area to work at HPC, a 60 minute travel time zone has been used. Therefore, this 60 minute zone has been used to assess the availability of local accommodation.

6.13 There are two elements to the Gravity Model:

- A weighting of the amount of accommodation in the area.
- A weighting of the distance from the HPC site

6.14 That is, the model assumes:

- Workers are more likely to live in areas which have more accommodation.
- Workers are more likely to live closer to the site

6.15 The conclusion to be drawn from this is that there is an expectation that workers will 'cluster' in urban areas. EDF disagree with the three Councils' concern that the travel time zone used should be reduced to

45 minutes. They believe that a 60 minute travel time is more appropriate as follows:

1. Construction workers will travel up to 90 minutes for work so the 60 minute assumption reflects the fact that non-home-based workers will choose to live closer to the site.

2. The Gravity Model is already weighted so that relatively few workers are expected to live as far as 60 minutes away, most will live much closer;

3. EDF Energy is proposing to run buses from locations such as Weston super Mare and Taunton direct to the site without going through the park and ride sites.

4. These locations would fall within a 45 minute journey catchment direct to the site and a 60 minute catchment via the park and ride sites.

Comment

6.16 There are limitations to the local road network, especially once potential commuters leave the M5. EDF are proposing to provide 'park and ride' facilities at Bridgwater, Cannington and, Washford Cross, west of Williton. The buses will be travelling over the existing road network and adding to existing traffic generated by commuters, locals and visitors. The road network west of the M5 across Sedgemoor, Taunton Deane and, especially West Somerset, provides few opportunities for overtaking and travel is determined by the slowest moving vehicle.

6.17 A significant component of the Accommodation Strategy is given over to considering the impact of the workforce on the different types of accommodation which they may seek to access. Taking each of these in turn:

Tourist Accommodation

6.18 EDF have made a 'conservative estimate' based on tourist accommodation capacity in the peak period (August) when demand is at its highest.

6.19 Assumptions have been made relating to the inappropriateness of some tourist accommodation for HPC workers, such as room sizes, planning restrictions on camping/caravanning provision, and affordability. The assumption is that 40% of serviced accommodation and 25% of camping/caravanning provision can be used, along with some self-catering accommodation – a total of 2,070 units. It is anticipated that the use of tourist accommodation by HPC workers will mainly be during quieter, and cheaper, off-peak periods.

Comment

6.20 There are unknowns in the capacity of tourist accommodation, for example, weather and workforce preferences etc. A reliable estimate of capacity is very difficult to achieve.

Private Rented Accommodation

6.21 EDF refers to the 2008 Housing Needs Survey, and claims that there are 21,919 private rented units within the 60-minute zone (incorporating the districts of Sedgemoor, Taunton Deane, West Somerset, North Somerset, and Mendip). Using a multiplier, this is said to equate to 50,796 bed spaces.

6.22 2008 vacancy rates were available for 3 of the 5 districts and ranged from 3.3% to 4.2%. Turnover in the private rented sector has been estimated (again for the 3 districts) at between 13% (West Somerset) and 24% (Taunton Deane). EDF refer to the rate of 36% churn/turnover rate for England as a whole, taken from the English Household Survey, despite this being much higher than the turnover figures in the 3 districts.

6.23 Using different assumptions of private rented spare capacity, EDF estimate that between 1,270 units (2.5% spare capacity) and 5,080 units (10% spare capacity) will be available to HPC workers (and probably more). There are a number of issues relating to these calculations as follows:

1. At 4.3.3 of the Accommodation Strategy, reference is made to the Northern Peninsula SHMA with regard to private rented sector vacancy rates, citing 3.5% for West Somerset, 4.2% for Sedgemoor and 3.3% for Taunton Deane. EDF also cites the 2008 English Housing Survey, which shows a national average of 13.3% However, the source is the Taunton and South Somerset SHMA study (Table 8.6 on page 89 of the main report).

2. At 4.3.5, it is stated that *"Evidence from the SHMA and the Census indicates the following annual turnover in the PRS:*

   - *West Somerset -13%*
   - *Sedgemoor - 20%; and*
   - *Taunton Deane - 24%"*

3. At 4.3.6, the 2008 EHS national average of 36% turnover is cited.

4. At 4.3.7, EDF discuss ‘frictional’ capacity in the private rented sector, which is the small level of vacancy required for the effective operation of the market, and it is assumed that capacity above this is additional and will be ‘available’ to HPC workers.

5. At 4.3.8, it is stated that *“There is no single data source which provides this capacity at the local level so we have used a combination of national and local datasets to identify some parameters”* but, as stated at 4.3.3, there is local evidence for both parameters (turnover and vacancy)

6. 4.3.9/10, EDF have used the highest local turnover of Taunton Dean (24%), but have used the EHS vacancy rates of 13%, despite other local evidence (at 4.3.3 above) showing much lower levels of vacancy, ranging 3.3% to 4.2%.

7. Spare capacity is calculated using the national vacancy rate of 13.3% minus monthly turnover of 2% (24% for Taunton Deane/12), giving 11% spare capacity. An alternative approach derived from average local vacancy rates of 3.5% + 4.2% + 3.3%/3 = 3.67%, minus a 2% monthly turnover giving 1.67% spare or additional) capacity. This would give a figure of 848 units, as opposed to the minimum EDF scenario of 1,270 units.

6.24 There appears to be an assumption that HPC workers will want to share larger private rented properties in order to reduce costs.

6.25 EDF do not believe that there is a significant relationship between social housing waiting lists and the dynamics of the private rented sector, so much so that they claim, *“the state of the private rented sector will have little effect on these households (those on social rented waiting lists). They key issue is the apparent success of choice based lettings applicants with low priority who have secured affordable accommodation. This implies that the supply of affordable accommodation is actually sufficient to deal with priority need and some property types have therefore being opened up to other lower priority households”.* (p.22, para 4.2.36)

Comment

6.26 The assumptions made in terms of spare capacity are ‘best case scenarios’. Reported vacancy rates of 3-4% are at the margins of that required to achieve normal turnover and demand for private rented accommodations continues to increase. There is, therefore, a risk of demand overwhelming supply, especially in locations of strong demand and limited supply.

HOUSING VISION

Owner occupied accommodation

6.27 Using the estimate of 500 owner occupied units being required over a number of years (the longer term of the HPC project), EDF anticipates demand of around 100 units per year, which it believes is absorbable within the current ‘churn’ and capacity of the market.

Latent accommodation

6.26 Understandably, this estimate is based on more qualitative and less reliable information. Using information gathered from an advertising campaign and the response generated, EDF estimate a supply of 400 bed spaces of latent accommodation that is spare rooms in people’s houses. It is predicted that this will increase but this is not explained and it is difficult to see why this should be the case. There is also the likelihood, through the impact of welfare benefit changes for those under 35 that demand may increase from single people requiring ‘shared accommodation’.

Comment

6.27 The potential supply of latent accommodation could decrease if some owners have bad experiences with lodgers, or with the rules/ regulations.

Overall Accommodation Capacity

6.28 The above analyses of accommodation type capacities suggests a capacity of >4,200 bed spaces (according to estimates based on the August conservative estimate).

6.29 If the number of proposed campus bed spaces (see below) is subtracted from peak demand, then this means that there is an anticipated demand from non-home-based workers of 2,200 bed spaces.

6.30 EDF believe that, at 2,200 required from a capacity of 4,200, there is sufficient allowance made for the spatial spread and different accommodation requirements/preferences of workers, which cannot be directly controlled/ influenced.

Campus-based accommodation

6.31 There are a proposed three campuses – 2 in central Bridgwater on brownfield land, of 850 and 150 units, the former of which has the potential to be considered for legacy conversion into student accommodation; the third on site at HPC with 510 bed spaces – this was reduced from 700 bed spaces owing to concerns from residents in surrounding rural areas about noise and anti-social behaviour (ASB) disturbance.

Comment

6.32 EDF has have stated that worker occupation of the campus accommodation will not be a condition of their contract of employment as this is deemed to be an infringement of the individual's 'human rights'. The proportion of workers making use of the campus accommodation is, as yet, unknown. Although it is understood and accepted that contractors and larger construction firms are keen on using the campus accommodation to house workers.

Monitoring and Impacts

6.33 EDF propose plans to monitor demand for, and supply of, accommodation through pre-induction processes with new workers; monitoring information on bookings made through the accommodation office; and, collection of information on location and type of accommodation used by workers during the construction period.

6.34 A number of potential impacts are highlighted:

- Pressure on tourist accommodation capacity thus impacting on the tourist economy.
    - EDF mitigation is to be through signposting away from tourist accommodation as required in peak periods
- HPC demand may reduce the supply of affordable private rented housing for local people, and therefore increase homelessness.
    - EDF mitigation through campus accommodation and identifying latent accommodation; also, EDF Housing Fund (see below)
- Potential providers of latent accommodation may not be aware of rules/ regulations; also, may encourage providers into the market of low quality.
    - EDF mitigation through a provider information pack
- Potential impact of increased pressure on public services.
    - EDF mitigation through the accommodation office

Housing Fund

6.35 Up to £12.5m is to be made available to the local authorities (West Somerset, Sedgemoor, Taunton Deane and North Somerset) to boost the supply of housing locally, including provision of affordable housing, bringing empty properties back into use, a rent deposit scheme, equity loans for people to access market/intermediate housing, tackling underoccupation, for use as equity investment, and for grant replacement. The timescale over which the Fund will be available is not clear is not yet agreed.

6.36 £4m of this fund is being provided early through the Section 106 Agreement for Site Preparation Works and will be spent in West Somerset and Sedgemoor.

6.37 A further £3.5m is to be paid to the four local authorities as part of the main Development Consent Order application and, if necessary, an addition £5m is available from a contingency fund should additional mitigation within the housing market of a particular area require additional measures to deal with impacts arising from the Hinkley Point project.

Threshold tests

6.38 These have been established in order to deal with uncertainties.

6.39 By ‘ward cluster’, there is the potential for demand to exceed supply for tourist accommodation in Cannington and Bridgwater during the peak tourist season (August). It is less likely, but still possible, to occur in Watchet and Williton.

6.40 In terms of the private rented sector, the possible impact is slightly more widespread – should there be a one third increase in the level of demand (workforce), then the areas where demand could exceed supply are Bridgwater (150 bed spaces), Cannington (30), and Watchet and Williton (40).

Quantifying housing market impact

6.41 This SHMA Update provides profiles of incomes, affordability and the housing stock, key findings from which are as follows.

In relation to incomes and affordability

- West Somerset has a predominantly low income distribution; the mean household income is 20% below the UK average.

- In 2012, full-time incomes from employment were only 83% of the South West regional and 78% of the national average.

- Over one quarter of those in employment are estimated to be self-employed, and a 2012 report identified that self-employed earnings were 14% lower than their employed equivalents.

- The SHMA estimated that in the market sector, only 1-2 bed flats were affordable for those in receipt of average incomes without housing support.

In relation to the profile of the housing stock

- West Somerset's housing stock has much lower proportions of flats and terraced houses and a low proportion of social rented housing. Such patterns will limit access to housing in a low income area.

- The area has a lower proportion of 1 bed properties which will limit access to housing in a low income area, especially for smaller households.

6.42 The potential impact of Hinkley Point C on the supply of housing within has been undertaken using GIS mapping as follows.

The catchment area

6.43 'Buffers' at 15 km, 25 km and 35 km from the site of Hinkley Point C. have been applied. The latter equates closely to the 60 minute catchment included in EDF's Transport Appraisal (Figure 8.3); 25 km equates to a 45 minute catchment and 15 km to 25 minutes. These buffers have been applied to subsequent maps focusing on the private rental and home ownership sectors. The following map shows the application of the buffer zones in relation to the proportion of privately renting households and demonstrates the extent to which the Hinkley Point C catchment extends across most of West Somerset and beyond.

6.44 It would require further detailed work to assess with precision the proportionate share of housing which the West Somerset catchment area represents, but the geographical area constitutes 20% of the catchment area in England. If this proportion was to be applied to EDF's estimate of the housing requirements generated by Hinkley Point C, this would equate to:

- Owner occupation 100
- Tourist 120
- Private rented 150

- Latent accommodation 80
- Total 450

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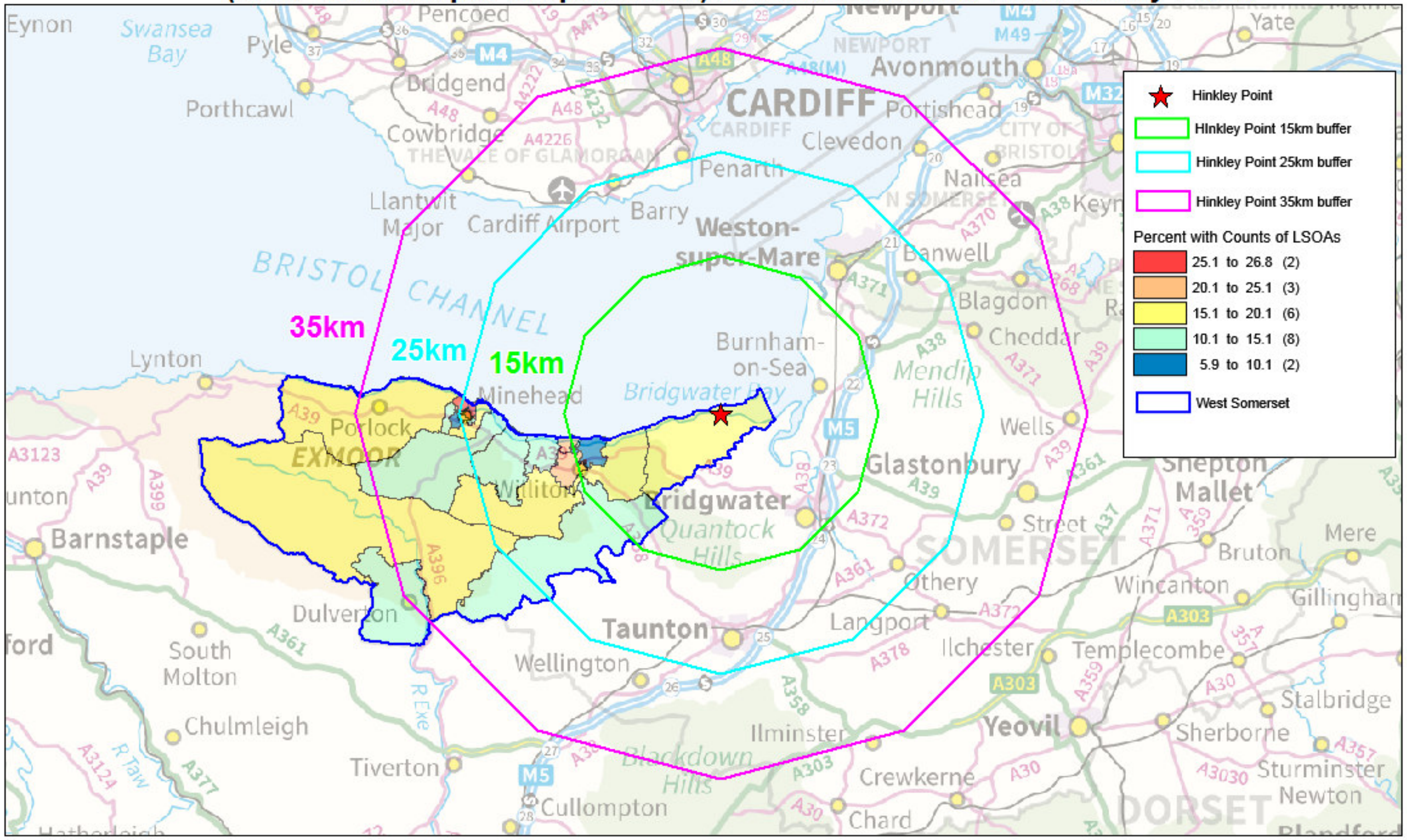
Percent of Households Private Renting within Small Areas (ONS Lower Super Output Areas) in West Somerset with Hinkley Point



Source: Table KS402EW, Tenure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website,http://www.neighbourhood.statistics.gov.uk/dissemination/.
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The private rented sector

6.45 Relevant key findings from the 2012 West Somerset Strategic Housing Market Assessment (SHMA) in relation to the private rented sector are as follows:

- The 2011 Census identified 2,510 privately rented homes in West Somerset, 16% of the total stock. 2,189 were rented from a private landlord or lettings agency.

- 476 decisions undertaken by the Valuation Office Agency in 2011-12 implied an annual turnover of 22% of properties rented from a private landlord or lettings agency. This is likely to be an under-estimate as the VOA only deals with the sector of the market for which Local Housing Allowance (LHA) can be claimed. The SHMA Update estimated an annual private rented sector turnover of 30%.

- 54% of decisions were for 2 bed or smaller properties which suggests that smaller households have more choice in accessing the private rented sector.

- No studio properties were recorded, which is of particular concern in the context of changes to LHA eligibility such that single people under 35 can only gain support for shared housing.

- An average of 110 properties was being advertised throughout September 2012 to March 2013.

- The main property type advertised was flats (41%), which suggests that smaller households have more choice in accessing the private rented sector but this will vary by location.

6.46 The following maps demonstrate the geography of supply and demand:

- From the 2011 Census, the proportion of private renting households varied from 6 to 27%;

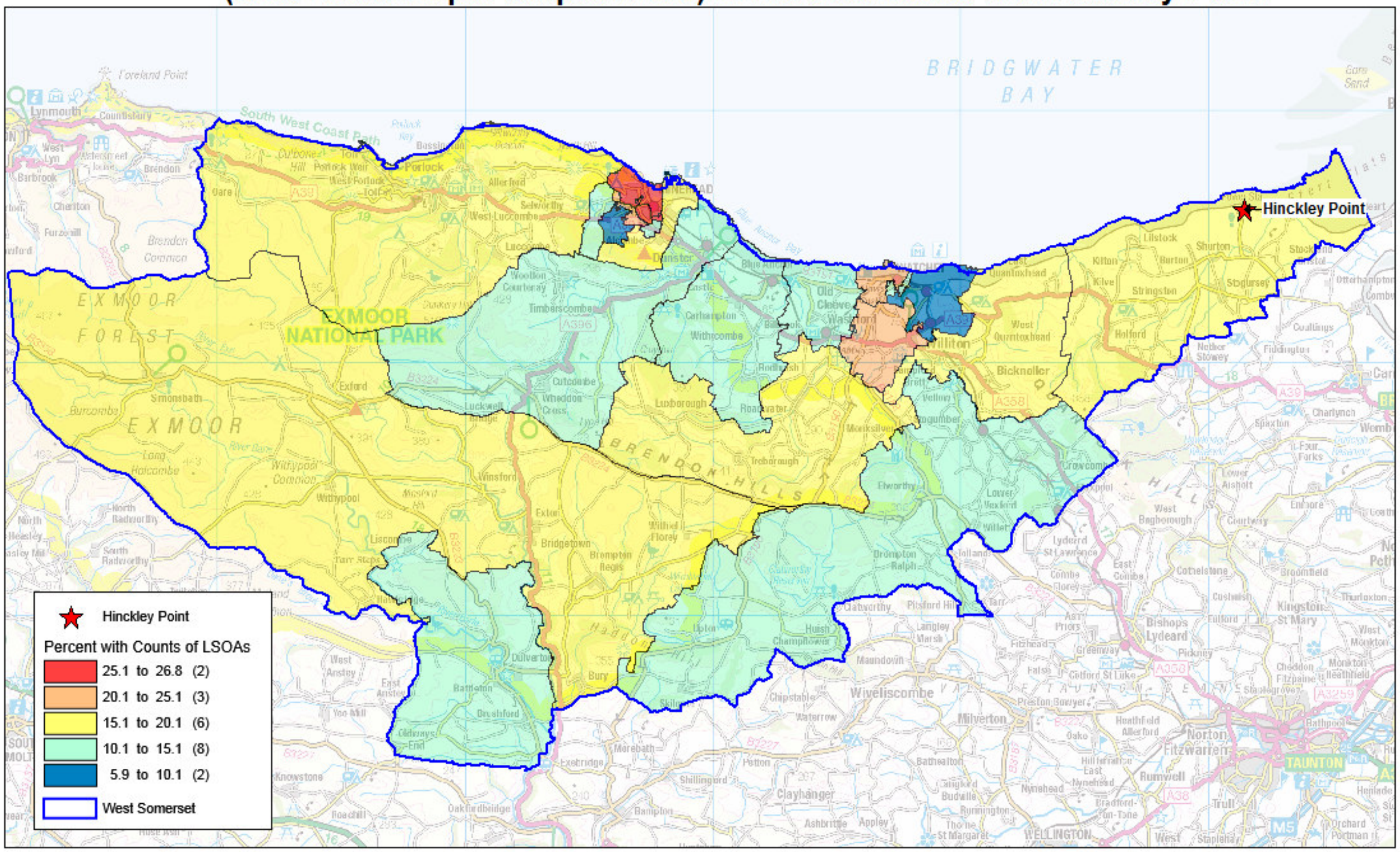
- Hinkley Point C is located in an area with an average proportion of private rented housing of between 15 and 20%;

- Locations with higher proportions of private rented housing are within 15 km (c. 25 minutes) at Williton and especially within 25 km (c. 45 minutes) at Minehead; and

- Until further multi-variate 2011 Census data is available, it will not be possible to determine the types of private rented properties by location, for example, flats/apartments, terraced houses etc.

HOUSING VISION

Percent of Households Private Renting within Small Areas (ONS Lower Super Output Areas) in West Somerset with Hinckley Point



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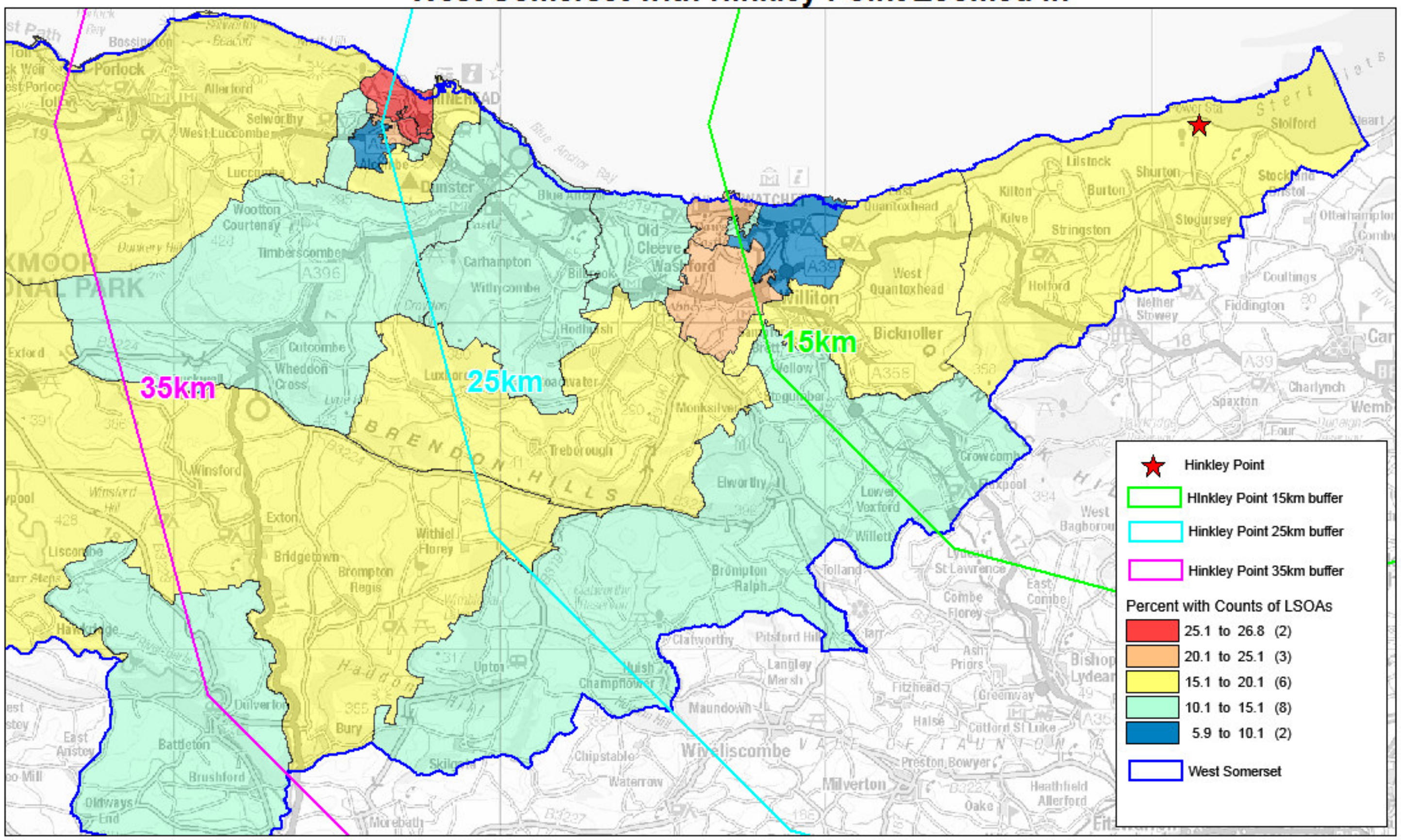
Percent of Households Private Renting within Small Areas (ONS LSOAs) in West Somerset with Hinkley Point Zoomed In



Source: Table KS402EW, Tenure, 2011 Census Data, Office for National Statistics, Neighbourhood Statistics website,http://www.neighbourhood.statistics.gov.uk/dissemination/.

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The home ownership sector

6.47 Relevant findings from the 2012 West Somerset Strategic Housing Market Assessment (SHMA) in relation to the home ownership sector

- In 2011/12, there was an average of 496 sales, equivalent to an annual turnover of 4.7%; and

- Sales of flats and apartments made up only 14% of the total - which suggests that smaller households have less choice in accessing home ownership. Sales of terraced houses made up just under one quarter of sales; semi-detached just over one quarter and detached properties made up more than one third of total sales.

6.48 The following maps demonstrate the geography of supply and demand:

- Hinkley Point C is located in a relatively lower value area, but where there were a small number of sales;

- Most sales in 2011/12 took place within the 25 km buffer (c. 45 minutes) of Hinkley Point C and therefore demand from employees will be concentrated within this catchment;

- Within 25 km (c.45 minutes), there are larger concentrations of lower value properties at £100k and under and of flats at Minehead.

- Within 15 km (c. 25 minutes), there are concentrations of lower value properties at £100k and under in Williton.

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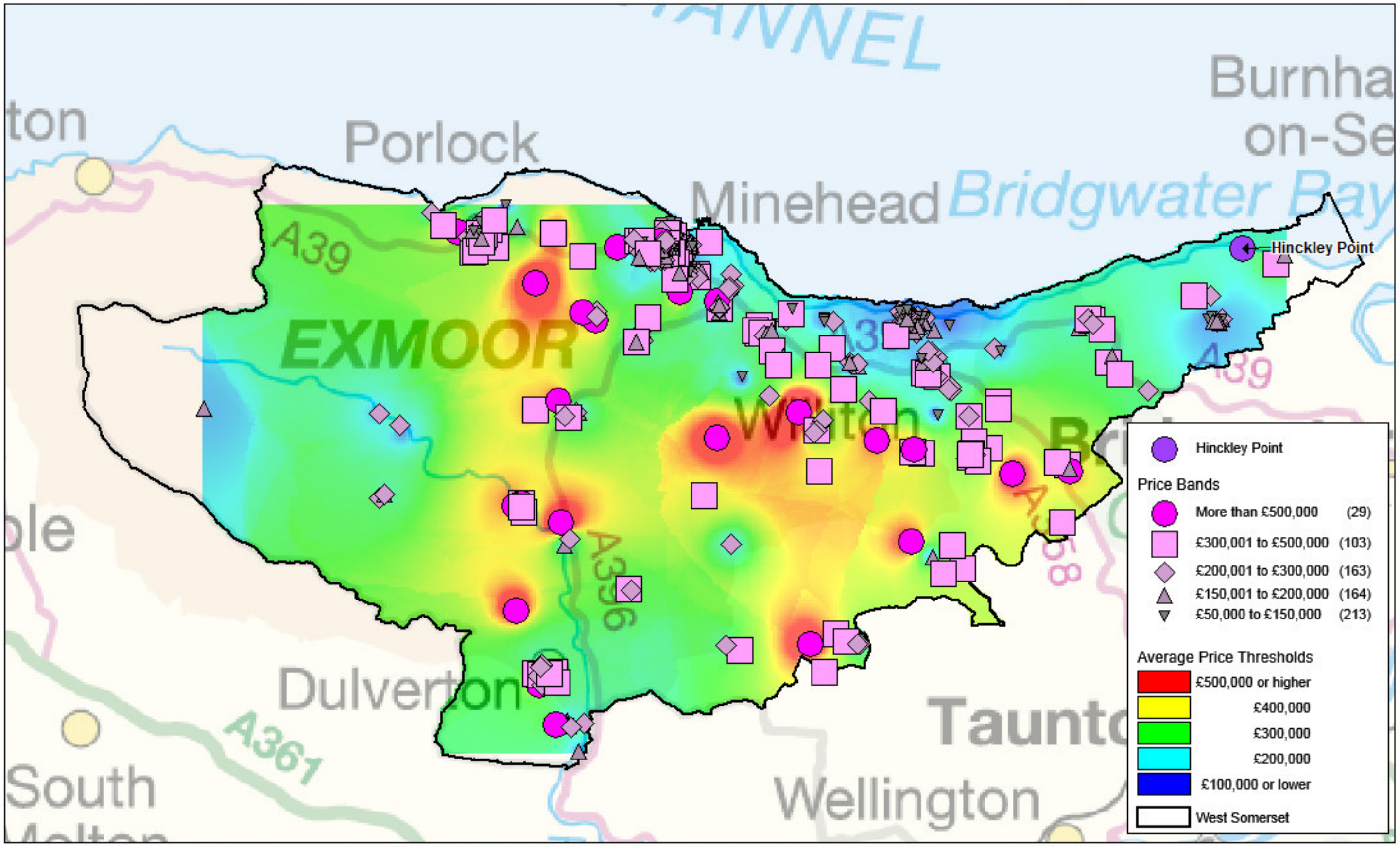
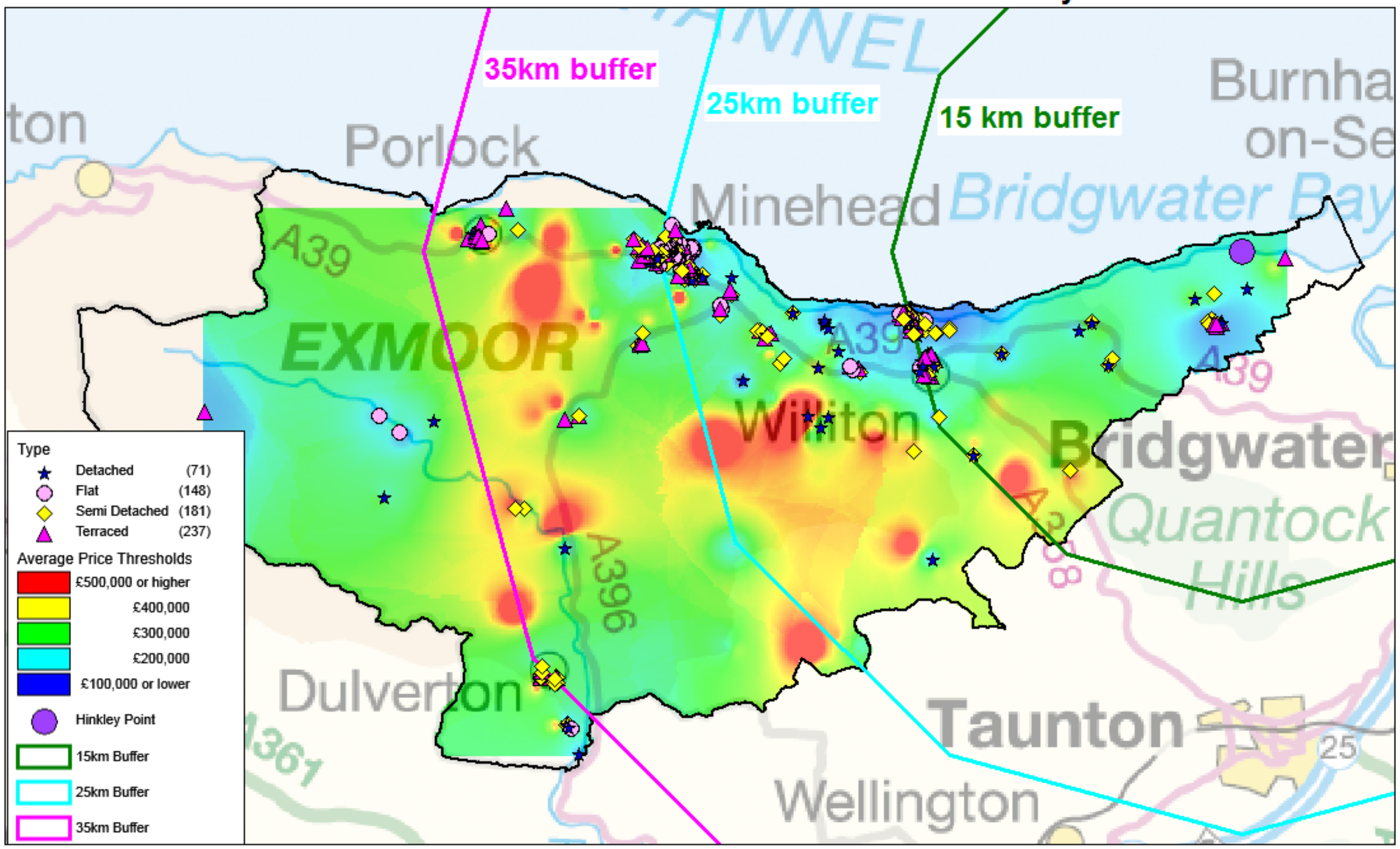
Average House Prices and Individual House Sales in West Somerset from 1/1/2011 to 30/4/2012 with Hinckley Point



Source: Land Registry Sales, Land Registry. Contains Ordnance Survey data (c) Crown copyright and database Right 2013.
Contains Royal Mail data (c)Royal Mail copyright and database right 2012. Contains National Statistics (c) Crown copyright and database right 2013.

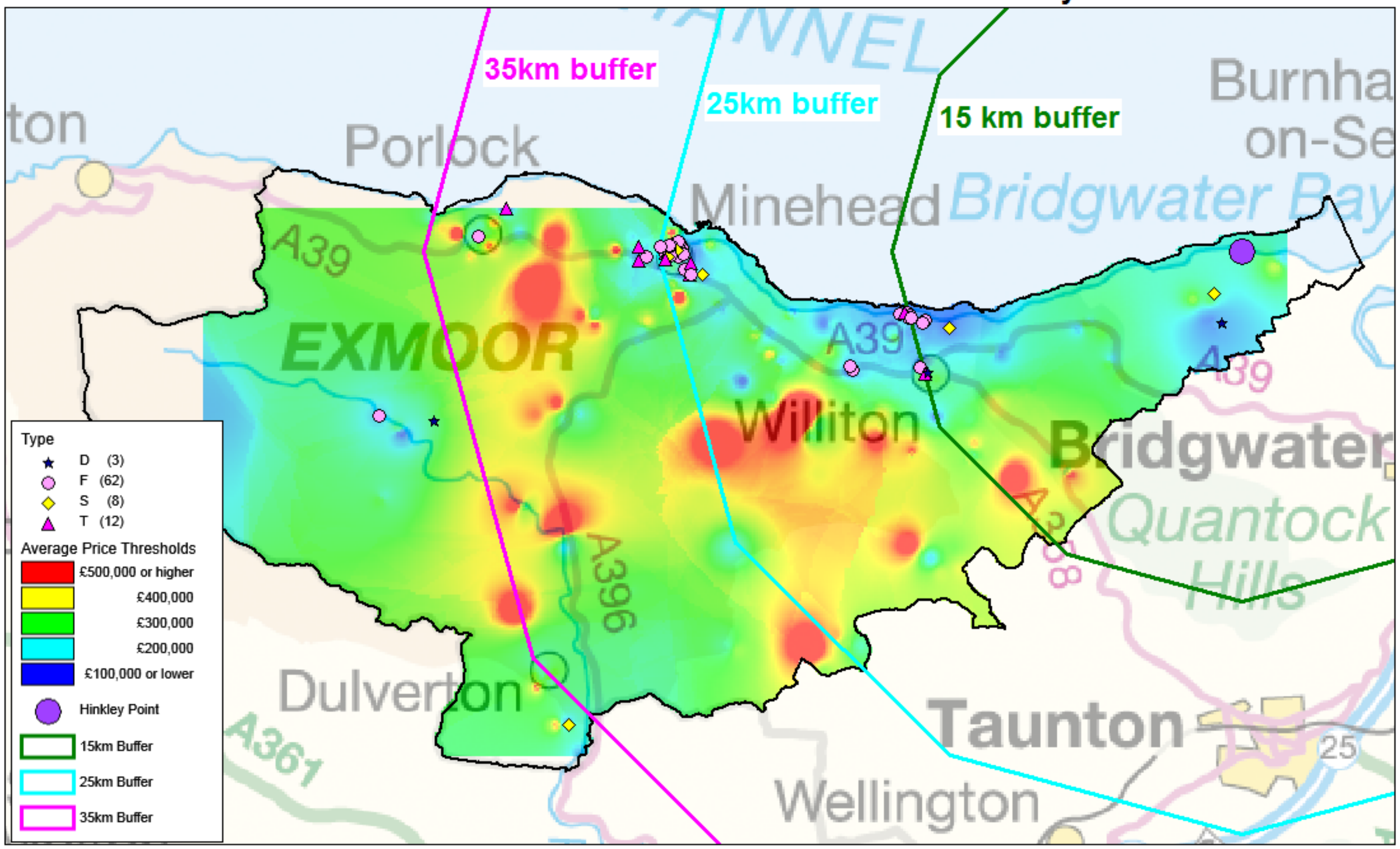
Average House Prices and Individual House Sales £200k or less in West Somerset from 1/1/2010 to 30/4/2012 with Hinkley Point



Source: Land Registry Sales, Land Registry. Contains Ordnance Survey data (c) Crown copyright and database Right 2013. Contains Royal Mail data (c)Royal Mail copyright and database right 2012. Contains National Statistics (c) Crown copyright and database right 2013.

HOUSING VISION

Average House Prices and Individual House Sales £100k or less in West Somerset from 1/1/2010 to 30/4/2012 with Hinkley Point



Source: Land Registry Sales, Land Registry. Contains Ordnance Survey data (c) Crown copyright and database Right 2013. Contains Royal Mail data (c)Royal Mail copyright and database right 2012. Contains National Statistics (c) Crown copyright and database right 2013.

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The housing market and the views of estate and lettings agents

6.49 In the first week of March 2013, three estate agents were interviewed in Minehead who also dealt with the wider area, and three in Williton and Watchet. A summary of the main points is set out below, followed by a fuller analysis.

Summary of main points

- **The sales market** is reasonably active, although there are fewer properties coming onto the market. It has improved slightly over the past 12 months.
- **Prices** are generally stable but some vendors are holding out for their asking price as they do not need to move.
- **The rental market** is very good, with properties letting quickly. Rents are fairly stable.
- **Housing demand in the Minehead area** is generally an incomers' market, popular with people looking to retire to the area.
- **Hinkley Point** has had no impact on the local housing market to date, and agents generally expect Bridgwater to be the prime location for incoming workers.
- **Demand for new homes** is generally good demand.
- **Options for 1st time buyers** are limited and they are in competition with investors.
- **Demand for shared ownership/equity** is mainly from local singles and couples. The majority of agents thought it represented value for money.
- **Demand from investors for buy to let** is active for property that would previously have gone to 1st time buyers, reflecting the high demand for rental housing.
- **Demand from second home owners** remains good, though not as great as it was prior to the recession.

How is the market performing? How has this changed recently?

6.50 Agents were reasonably positive about the sales market. One was clear that there was an improvement but was concerned that insufficient properties were coming on to the market. Two indicated the market was picking up; one thought it was totally price dependent; and one thought it was patchy. The general view was that the market had stabilised over the past year with no increase in prices; there was little expectation that it would change substantially. Four agents indicated slightly less stock was coming onto the market, although demand was similar.

6.51 The rental market is performing well and has not changed substantially during the past year. One agent in Williton indicated that rents had decreased and one in Minehead said some potential renters were seeking to negotiate a lower rent than the landlord was asking. A third agent indicated that rents were rising slightly.

6.52 Two agents reported that the housing benefit changes had caused some people to look for cheaper properties.

What's selling well/not so well?

6.53 All agents reported that the lower end of the market was selling well; the sort of home that would previously have gone to first-time buyers was now attracting investors. One agent reported that all price ranges were selling well, whilst another said that homes over £350k and unusual properties were also popular.

6.54 One agent said nothing was selling with difficultly; the others identified mid-range properties were difficult to sell - "the standard 3-bed semi". These are the sort of properties that local families seeking to upgrade would buy in better times. One agent added that properties over £1m were difficult to sell.

What's renting well/not so well?

6.55 All three agents who dealt with rental properties singled out 2 and 3 bedroom houses as most popular. One agent found that one bed flats were more difficult to let, the others could not give examples. The average time taken to let a property ranged from 2 to 6 weeks; the typical length of tenancy was 18 months.

What's the typical cost of 1 bed flat, 2 bed flat, 2 bed house and 3 bed house to purchase and rent?

6.56 The table below covers the range of costs given. The Minehead agents indicated that Williton and Watchet are slightly cheaper than Minehead but this was not really borne out by the price examples given. Agents were reluctant to identify price differentials between areas, saying price was determined by the type of property, not the area.

Table 6.1: estate agents estimates of sale prices and rentals by property type and bedsize

Property	£
Sale prices	
1b flat	70-125k
2b flat	75-180k
2b house	125-160k
3b house	165-250k
4b house	200-500k
Rents per calendar month	
1b flat	400-474
2b house	575-600
3b house	650-750
4b house	750-900

What are the gaps in the market - for sale or rent?

6.57 Gaps in the sales market were identified as 3 bedroom houses by two agents with another identifying 2 bedroom houses. Village properties were cited by one agent and 4 bedroom detached homes by another who also reported a shortage of 3 bedroom homes.

6.58 One agent thought there was a general shortage of rental property; one cited 2 bedroom homes and the third 2 and 3 bedroom homes.

Is there oversupply anywhere in the market - for sale or rent?

6.59 Two agents identified an oversupply of purpose built flats for sale and two cited bungalows. One thought there was no oversupply in the sales market and no one considered there was oversupply in the rental market.

What is the extent of interest from second home owners and investors?

6.60 There was little interest from second home owners in Williton where sales have declined from 25% of properties sold to fewer than 10% over the past 2 to 3 years. There was slightly more interest in Watchet where sales accounted for 10 to 15%. In Minehead, one agent reported declining interest with sales of approximately 10%; another two reported stable interest, with sales varying between 33% and 50%...

6.61 All agents reported an active investor market with purchasers buying property which would formerly have gone to first-time buyers. The Minehead agents all reported investor purchases accounted for some 20% of all sales; the Williton agents estimated such purchases accounted for 50% of sales and the Watchet agents 10%.

What impact do you think the building of Hinkley Point C will have on the housing market?

6.62 So far, agents have noticed little impact and were divided in terms of its future impact. One pointed out that Minehead is on the periphery of the area and workers are likely to go to Bridgwater in particular and to Taunton; the Minehead area may attract middle management in the future. One agent thought the project would be good for the rental market and one thought it essential that new homes were not built in large estates.

Where does most demand come from?

6.63 Although one agent identified a 50:50 split between local demand and demand from outside, the other agents reported demand was primarily from outside the area; two agents estimated the proportion of outsiders was as high as 80%. Incomers came from all over the country, many looking to retire to the Minehead area. Very little demand came from local single people and families.

What options are available for 1st time buyers? What rental options are available?

6.64 Agents thought there were very few options available for first time buyers; mortgages are still very difficult and the properties they would ordinarily buy are being bought by investors.

6.65 If potential first-time buyers could not afford to buy, agents generally thought there were good rental options available, although the Watchet agent said there was little available locally.

What's the demand like for new homes? What proportion of the asking price is being achieved?

6.66 Four agents thought there was a demand for new homes but there was little available in the area; one thought there was not much demand. New homes were thought to attract a higher proportion of local people, although investors and incomers were still mentioned.

6.67 Of the agents who offered an opinion on the proportion of the asking price being achieved, one thought it was 2-3% below the asking price and one indicated the price needed to be keen from the outset. Incentives offered included carpets and appliances, legal fees and part-exchange.

Is there a market for shared ownership/equity in the area?

6.68 4 agents considered there was definitely a market and one thought there was not. Local couples and singles seeking to get a foot on the housing ladder were seen as most likely to go for shared ownership/shared equity.

6.69 All but one agent thought shared ownership/equity represented value for money; even one who considered it was not a safe option.

Is there anything else you'd like to add about the market in the area?

6.70 Three agents offered further comments.

"It's a stable market; it doesn't change drastically and there's room for expansion." (Watchet agent)

"We're lucky to be in this area, near Exmoor and the Quantocks." (Williton agent)

"We're lucky where we live; the market is quite resilient as people want to be down here" (Minehead agent).

Conclusions

6.71 In a low income and high market value area, in which opportunities for home ownership are constrained by the continuing recession, and in which there is a projected requirement for over 100 additional homes each year, it is inevitable that additional demand for housing from employees at Hinkley Point C will impact on the housing market and generate additional competition for homes. More specifically:

- West Somerset constitutes 20% of the Hinkley Point C catchment area in England. If this proportion was to be applied to EDF's estimate of the housing requirements generated by Hinkley Point C, and assuming that all campus accommodation was taken up, this would equate to 450 units consisting of:

    - Owner occupation 100
    - Tourist 120
    - Private rented 150
    - Latent accommodation 80

- The main locations of accommodation of all types at Williton and Minehead are within 25 minute and 45 minute travel times respectively and are likely to be in demand from HPC employees.

- There is no evidence of spare capacity in the market for sale properties within which there may be additional demand for in the region of 100 properties.

- Sales of flats made up only 14% of the total in 2011-12 which suggests that smaller households have less choice in accessing a housing option most likely to be attractive to HPC employees.

- There are concentrations of lower value homes, especially flats in Williton (within 25 minutes), and especially in Minehead (within 45 minutes), which are most likely to be in demand from HPC employees.

- The only area of oversupply identified in the owner occupied market – by only two estate agents - was purpose built flats, which might prove suitable for Hinkley Point C employees.

- The EDF methodology for identifying spare capacity in the private rented market represents an optimistic scenario. However, there is no evidence of spare capacity in the high demand market for rental properties within which there may be additional demand for in the region of 150 properties.

- There are concentrations of private rented accommodation in Williton (within 25 minutes) and especially in Minehead (within 45 minutes) which are accessible to HPC employees.

- In contrast with the home ownership sector, the main rental property type advertised is flats, which are most likely to be attractive to HPC employees.

6.72 The combination of limited supply of properties at the lower end of the property market, investor interest in these types of properties and the additional demand generated by HPC workers could create market conditions that make them less available and affordable for local people attempting to gain their first-step on the home- ownership ladder.

Conclusions and Recommendations

Introduction

7.1 This section draws together the key issues and problems facing the housing market in West Somerset and the interventions appropriate to responding to them. In conformity with the original SHMA, and with the exception of projected housing requirements, the recommendations are strategic in nature.

Issues and problems

An unaffordable housing market

7.2 The fundamental problems in West Somerset are that market housing is overvalued relative to local incomes and that there is an inadequate supply of affordable housing, especially for families. These are not problems unique to the area but they are exacerbated by a historically high demand for and low supply of affordable housing and, net migration which places additional pressures on housing demand in the market sector. Problems have worsened since 2008 due to problems accessing personal finance.

7.3 The extent of the current problem can be demonstrated on the basis that lower quartile incomes would have to increase more than threefold for a 2 bedroomed re-sale house to be affordable. Alternatively, property prices would need to fall by 70% in West Somerset to achieve the same level of affordability.

7.4 It is not possible to predict with any confidence likely future patterns of inmigration, but even if rates are depressed in line with economic conditions, demand will simply be pent up and accelerate once conditions improve. The imperative, in such circumstances is to increase the supply of affordable and lower cost market homes as discussed below.

An imbalanced housing market

7.5 The area has historically a larger stock and supply of larger and detached homes which places the housing market at a disadvantage in adjusting to changing demographics within the existing population and from new and additional households - both of which identify a requirement for more smaller homes. Whilst this Update is focused on meeting the requirements arising from household growth, it is important to ensure that best use is made of existing housing, for example by encouraging older households to downsize, or by the adaptation of homes to meet changing requirements.

HOUSING VISION

7.6 However, it is essential not to lose sight of the requirements of families, especially those dependent on lower incomes. There is clear evidence in terms of supply and affordability that local families are at a serious disadvantage in the housing market and that supply needs to be increased to meet their needs.

The growth in the older population

7.7 The greatest challenge facing the housing market arises from the dramatic increase in the size of the older population and in the number of older person households which have a number of related implications:

1. Most older person households already live in the area in family housing but, as health and mobility are impaired with age, many older people will find that their homes and/or their location are increasingly unsuitable. This creates the dilemma for many older people of either staying put and being supported in their existing homes - which is the principle informing heath and social care - or moving to a more suitable or suitably located including downsizing.

2. The decision to stay or move will be determined by a combination of personal choice and the viability and practicality of providing home-based care and support, especially in dispersed rural areas. However, if older households do not move and downsize, a growing number of older households will under-occupy existing housing and this will have the effect of ‘home blocking’ family housing. In such a situation, replacement family housing will be required to ensure that the current supply of this type is maintained.

3. If housing more suitable to meeting the requirements of older households is provided, it will have to be of the right type and quality in the right locations, for example providing 2 bedroomed bungalows in villages. This may create a dilemma in terms of acceptability to communities and there is also a need to market test the acceptability of such options in West Somerset by consultation with elected members, town and parish councils, representative and lobbying bodies for older people and with affordable and market sector providers.

4. There will also be a requirement for an expansion in housing which provides support and/or care including designated, sheltered and extra-care housing, the detail of which has been provided in the previous chapter.

HOUSING VISION

Interventions

Increasing supply

7.8 It is essential that housing supply is increased to provide additional housing in line with housing projections and to meet any backlog of housing need. Increased supply does not only mean building new homes but can be achieved from the existing stock, for example by applying polices to reduce under-occupation and empty homes. Increasing the supply of affordable housing is the absolute priority and every means, however radical, should be explored to increase its supply. This is a particular imperative in West Somerset where, by every indicator of need, the situation is acute. The lowest priority is building large family housing in the market sector, a type of supply which may well support or stimulate inmigration. The following section identifies how much housing needs to be provided in West Somerset between 2011 and 2031.

The projected requirement for housing in West Somerset, 2011-2031

7.9 Applying the principles of modelling explained in the previous chapter, the following tables identify the projected housing required by bedsize and tenure for the period 2011-2031.

Table 7.1: projected net housing requirements for West Somerset 2011-2031, without backlog

Tenure	Sector	1 bed	2 bed	3 bed	4+ bed	Total No.	Total %
Affordable	Social Rent	588	74	593	-4	1,251	52.16%
	Affordable Rent	111	14	112	-1	236	9.86%
Intermediate	Shared Ownership	198	25	200	-1	421	17.57%
Market	Private Rent	32	4	32	0	68	2.84%
	Owner Occupier	198	25	200	-1	421	17.57%
Total no.	All sectors	1,127	142	1,136	-8	2,398	100.00%
Total %	All sectors	46.99%	5.94%	47.40%	-0.33%		100.00%

(Source: Housing Vision, West Somerset Housing Requirements Toolkit)

Key findings:

- There is a requirement for 2,398 additional homes in the West Somerset LPA area between 2011 and 2031.

* There is a projected large growth (47%) in the requirement for 1 bed housing; 6% growth in the requirement for 2 bed; 47% growth in the requirement for 3 bed housing and a slight decline in the requirement for 4 bed housing. Please note that these projections are based on the application of a minimum bedsize requirement. In view of restrictions imposed on eligibility for Housing Benefit, it is likely that the requirement for 1 bed affordable housing will be limited to this bedsize but in the market sector, there is likely to be a preference by consumers and providers for an additional bedroom which, in terms of the greater flexibility achieved, should be encouraged. The 1 bed housing requirement also includes 385 designated, sheltered and extra-care housing for older people as detailed at 6.13 below, some of which could also be offset against the 2 bed requirement.

Specialised housing requirements for older people

7.12 The following table summarises the specialised housing required for older people between 2011 and 2031 and the number of under-occupying pensioner households. Please note that this table is a sub-set of the overall housing requirements above. Whilst providers may decide to provide larger accommodation, all of this housing meets a minimum 1 bed requirement.

Table 7.2: projected specialised housing requirements of older households for West Somerset, 2011-2031

65+ Households	65+ totals	Designated	Sheltered	Extra Care	Specialised Total	Under-occupying (62.63%)
2011	5,197	327	156	152	635	3,255
2031	7,801	491	234	261	986	4,886
Change	2,604	+164	+78	+109	+351	1,631

(Source: Housing Vision, West Somerset Housing Requirements Toolkit)

Key findings

* Based on an estimated current requirement for 635 specialised units of accommodation in West Somerset, there is a projected requirement for 351 additional units to be provided between 2011 and 2031.

* This includes 109 Extra Care housing units from a current requirement of 152, a total of 261. The 2008 Somerset Extra Care Housing Strategic Review undertaken by Peter Fletcher Associates identified a requirement for 193 Extra Care units in West Somerset by 2018 and 236 by 2018, based on the provision of 97 units in 2008.

Measures to increase the supply of additional housing

Adopting a radical approach

7.13 Conventional approaches to securing supply, even in times of strong economic performance, have produced relatively low rates of affordable housing production. Less conventional approaches need to be explored with registered providers and private landlords including:

- The provision of temporary housing, including mobile homes. This is usually anathema to registered providers but it is an established sector within the local housing market and may provide a more rapid approach to meeting acute need, especially in deeper rural locations.

- Encouraging the conversion of commercial premises to residential use, an approach which may be more appropriate in rural locations;

- The active encouragement of self-building and community-based initiatives such as community land and asset trusts which may be more appropriate in more rural locations. Such initiatives are currently receiving strong support from the government through the HCA, see for example:

  http://www.homesandcommunities.co.uk/community-led-development

  They include the 'community right to build':

  http://www.communities.gov.uk/communities/communityrights/righttobuild/

  Community Land Trusts:

  http://www.communitylandtrusts.org.uk/home

  and self-build pilots:

  http://www.insidehousing.co.uk/development/hca-to-trial-self-build-with-five-pilots-and-%C2%A330m-fund/6521889.article

7.14 We would strongly advise organising a 'West Somerset Affordable Housing Summit' to bring together all stakeholders to explore and agree an approach to improving supply across the district, including developers and housebuilders; estate and lettings agents; registered providers and private sector landlords; and relevant voluntary and community sector agencies.

Providing family housing

7.15 Families, especially larger families, are at a disadvantage in the housing market and it is essential that affordable housing supply is increased. Homefinder Somerset data, which is likely to be an underestimate, indicates a current demand for 132 4 and 5 bed homes, 10 of whom are in the Gold Priority Band category

Providing housing suitable for older households

7.16 Housing will need to be provided to meet the housing requirements of older households; to meet their growing support and care needs and to encourage downsizing. This is a priority for the area and will require the construction of substantial numbers of suitable homes. New housing should ideally be mixed tenure so that all older people have more opportunities to meet their housing requirements. Mixing the tenures on a site also enables cross-subsidy to provide social rented homes. Consideration should therefore be given to mixed tenure retirement communities providing housing capable of meeting the widest range of support and care need.

7.17 Good standard, accessible two bedroom accommodation offers a sustainable housing solution as it provides housing options for people across a broad age range and demand will not be an issue as the older population decreases in the long term.

Developing and promoting bespoke shared equity/shared ownership housing

7.18 Local households, especially families, are at a considerable disadvantage in accessing home ownership. Very limited amounts of intermediate ownership have been developed in the ~~two~~ district~~s~~ and accessing personal finance is currently a massive constraint affecting those entering the market for home ownership. Consultation is required to identify the potential to develop bespoke product for shared equity/ownership properties which are in very limited supply including with providers and potential purchasers, details of which will be held by the HomeBuy Agent 'South West Homes'. The Affordability and Housing Options Toolkit can be used to model the affordability of bespoke products for households in receipt of local incomes and which might be procured through Planning Agreements. The existing web pages HomeBuy in West Somerset provide the opportunity to undertake consultation with potential purchasers and promote bespoke options:

https://www.sharetobuy.com/sharedownership/in/West_Somerset

Working with the private rented sector

7.19 There are positive and negative sides to the expansion of the private rented sector. It has increased the supply of affordable rented housing but it may also have had the impact of reducing the supply of financially accessible homes for first time buyers. However, the private rented sector has and will continue to have a major role in the supply of housing and especially affordable housing. Close co-operation with landlords is essential in securing and steering the pattern of supply and existing landlord fora could form the basis for developing a more strategic approach to investment by client group and location. This is particularly necessary for younger single people where there is a need to develop suitable shared accommodation options, to monitor supply and to reassess attitudes towards tenants in receipt of Housing Benefit. The alternative might be an increase in poorly managed, poor condition, houses in multiple occupation.

Measures to increase supply from the existing stock

7.20 Under-occupation and overcrowding are 2 sides of the same coin, a reduction in under-occupation may have the effect of tackling overcrowding by increasing the supply of family homes. The district is currently included in three initiatives to increase supply from the existing stock:

- In relation to reducing under-occupation: Magna Housing Association's downsizing scheme for under-occupying tenants;
- In relation to empty homes: the Somerset West Private Sector Housing Partnership which employs a dedicated empty properties officer; and
- In relation to support for private landlords and tenants: the Somerset West Landlord and Tenant Services providing a range of support services including a landlord accreditations scheme.

The requirement for further research and intelligence

7.21 The following priorities have been identified:

1. assessing the impact of housing and welfare reforms

7.22 It is essential that detailed analysis and continual monitoring is undertaken of the current and proposed changes.

2. assessing the impact of second and holiday homes

7.23 Further analysis is required of the performance of this sub-sector of the housing market, in particular:

- the extent to which this sector is self-contained in terms of sales or whether homes are moving in and out of the sector; and

- the extent to which second and holiday homes become permanent homes, either for their existing owners or at sale.

3. assessing the impact of the construction of Hinkley Point C

7.24 Further analysis is required of both the short and long term impacts on the housing market of the construction of Hinkley Point C, especially in relation to house prices and the availability of affordable housing. Specific assessment will be required of:

- preferences in relation to the overall catchment area and the extent to which housing in West Somerset proves attractive to construction and related employees;

- the impact on the private rental and lower value home ownership sectors; and

- the take up of campus accommodation.

4. monitoring and review

7.25 Whilst housing strategy and planning policy officers will already be monitoring a number of indicators, it is essential to:

- research the extent of downsizing, the types of housing which older people are buying - both existing and new residents - and the housing which will encourage downsizing;

- revise the 2008 Strategic Viability Assessment to take account of changed housing market conditions;

- research the status of minority ethnic communities, include recent migrants from central and eastern Europe, identify their current and future housing requirements and their impact on the housing market;

- monitor the supply of new housing by type, size, tenure and location;

- monitor the number of residential conversions to inform housing supply data; and

- begin to monitor changes in the number of households using, for example, Council Tax data and/or housing completions.